



European **Political**
Strategy Centre

10 TRENDS

SHAPING

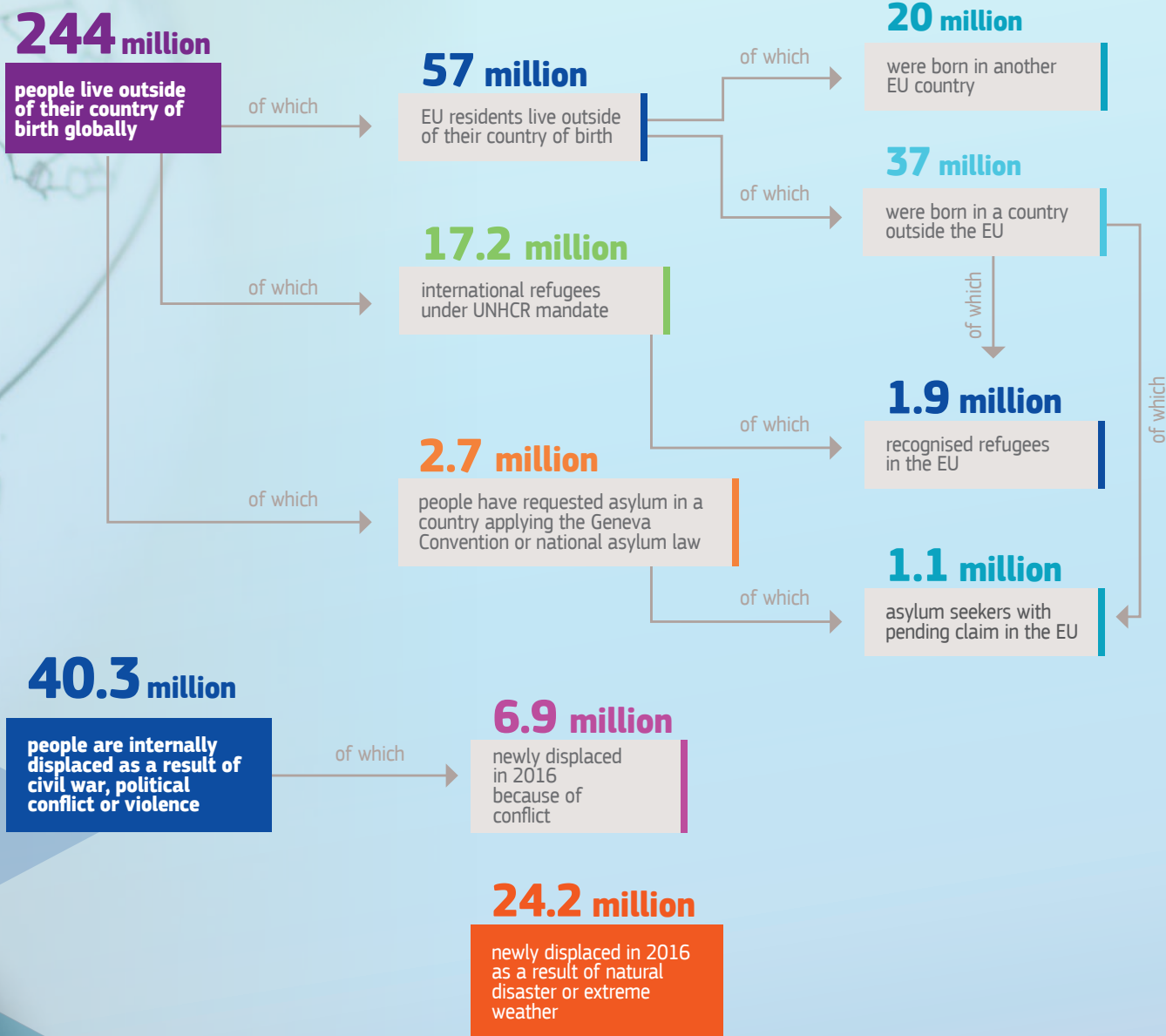
MIGRATION





PEOPLE ON THE MOVE, IN EUROPE AND BEYOND

Situation end of 2016



Source: United Nations High Commissioner for Refugees, Eurostat, European Political Strategy Centre

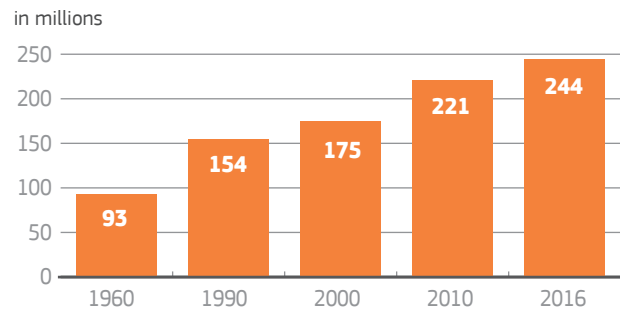
GLOBAL

MIGRANT POPULATION UP

BUT FLOWS REMAIN STABLE

- Today, about **244 million people live outside their country of birth**. That's **3% of humanity**.
- The absolute number of people living outside their country of birth is higher than ever before. It increased from 93 million in 1960 to 244 million in 2016. This rise is in line with an expanding global population that has grown from 3.0 billion to 7.5 billion over the same period (1960-2016). As a result, the **global share of people living outside their country of birth has remained more or less stable over time** (close to 3%).
- **In Europe, however, population growth has been small during the last decades and is mainly driven by immigration.** At the same time intra-EU mobility is growing. As a result, 57 million residents of EU Member States are born in another country – **11.3% of the EU's total population** – the highest number and share ever recorded. Of these 57 million roughly **20 million have come from other EU Member States**, while approximately **37 million were born outside the EU**.
- In contrast to general perceptions, the **global flow of people who have recently migrated from one country to another is not growing**. In the early 1980s roughly 28 million people changed their country of residence. Flows peaked between 1995 and 2000 when 43 million people moved to another country. More recently, between 2010 and 2015, **about 36 million migrants changed their country of residence. This corresponds to 0.5% of the global population**, and an average of 7 million international migrants moving per year.

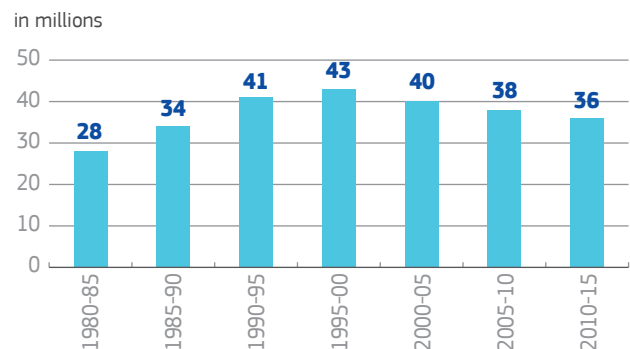
The number of people living outside their country of birth is growing proportionately to global population...



Source: United Nations Population Division

...But international migration flows have remained stable

Millions of people having migrated from one country to another during the previous 5 years



Source: United Nations Population Division, Abel 2016

MORE PEOPLE LIVING ABROAD, BUT NOT MORE MOBILITY: A PARADOX?

Why is the number of people living outside their country of birth growing despite stable migration flows?

Two completely unrelated reasons are responsible for this:

1. Declining return migration: the return of regular migrants and refugees to their country of origin has become less likely.
2. Increasing longevity: migrants, like native populations, enjoy an increasing life expectancy in their destination countries.

Both trends work in the same direction: In contrast to earlier generations, more migrants stay for good and live longer in destination countries.

Statistically, people living outside their country of birth are counted in what is commonly referred to as the 'stock of international migrants' for the rest of their lives (unless they return to their country of origin). This is regardless of whether they acquire the citizenship of their destination country.

As a result, the global stock of 244 million people living outside their country of birth (which includes the 57 million EU residents living outside their country of birth) covers recent migrants and refugees, but also people such as the ethnic German Aussiedler from the 1990s, former guest workers of the 1960s, and even people who migrated prior to World War II and are still alive.

Two concrete examples illustrate this: Henry Kissinger, a former refugee from Nazi Germany, and Anne Hidalgo, the Spanish-born Mayor of Paris, are both part of this category.

MOST MIGRATION IS INTRA-CONTINENTAL

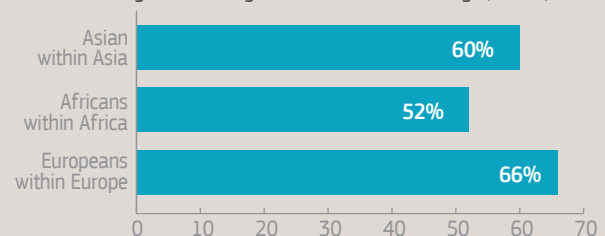
While Europe is an attractive destination for migrants from around the world, the vast majority of migration in Europe and globally is intra-continental.

People move but the majority tend to stay close to home. In fact, the pace of growth of intra-EU mobility has been much faster than that of non-EU immigration to the EU.

The same holds for South-South migration flows (across developing countries but also to rich countries like the Gulf States and Singapore), which are still higher than South-North movements (from developing to developed countries.) In 2015, 90.2 million international migrants born in developing countries were living in other countries in the Global South, while 85.3 million born in the South lived in countries in the Global North.¹

Most migrants move within their own continent

Share of foreign-born living in their continent of origin, 2015, in %



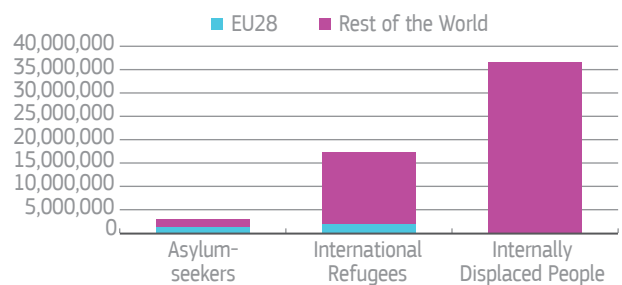
Source: United Nations Population Division, Eurostat

FORCED DISPLACEMENT SURGING IN A FRAGILE WORLD

- The number of people displaced as a result of armed conflict, human rights violations, or persecution has increased dramatically over the past decade.
- Most displacement occurs within countries: **the number of internally displaced people as a result of conflict and persecution has increased from 28.8 million in 2012 to 40.3 million in 2016.** 6.9 million people were displaced internally due to conflicts in 2016 alone.²
- However, the total number of people seeking protection outside their country of origin has also increased significantly. **Since 2012, the number of refugees registered with the United Nations High Commissioner for Refugees (UNHCR) has grown from 10.5 million to 17.2 million.** 75% of the increase is due to the conflict in Syria.
- **Most of the burden is typically borne by neighbouring countries around a conflict zone.** For instance, over half of the 5.5 million Syrian refugees have found shelter in Turkey, Jordan, Lebanon, and Iraq. Almost all of the 1.4 million refugees from South Sudan have fled to neighbouring Uganda, Ethiopia, Sudan, Kenya, and the Democratic Republic of Congo. The logic is simple: families who have lost their homes and loved ones go to the closest place where they can find peace and sustenance. Only when those bare conditions change (for example when conflict develops in the host state or food rations are at risk of ending) do refugees seek shelter elsewhere.
- **Refugees are now staying longer in host countries than in the past,** as two-thirds of all refugees cannot return home due to protracted conflicts.³

Forced displacement today

Total number of refugees, asylum-seekers and internally displaced people around the world; year end 2016



Notes: The category 'Internally Displaced People' includes only people displaced as a result of violent conflict and persecution. Displacement as a result of natural disasters is not included.

Source: United Nations High Commissioner for Refugees; Internal Displacement Monitoring Centre

REFUGEE CAMPS HAVE FUNDAMENTAL PROTECTION ROLE BUT ALSO COME WITH CHALLENGES

28% of the world's refugee population lives in managed camps. Most such camps provide structured, well organised and fundamental protection to large groups of people fleeing persecution or natural disasters.

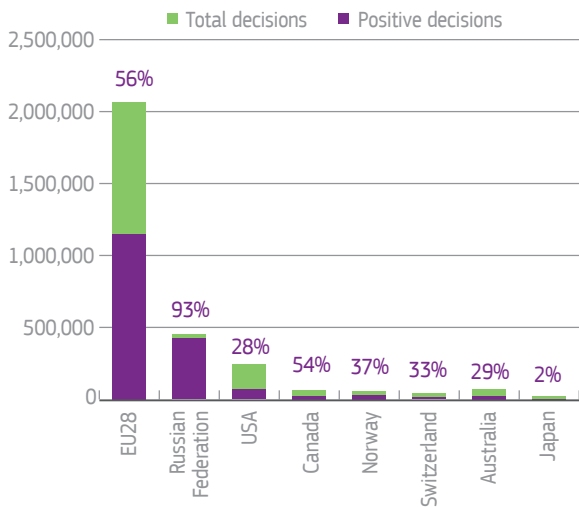
There is a flipside to this, however. When refugees stay in camps for extended periods of time - sometimes even for successive generations - this reduces the likelihood of integration into the recipient society and risks creating total dependency on external donors.

Given Europe's geographic position and reputation as a beacon of stability, generosity and openness amid growing global instability, Europe is likely to continue to represent a source of refuge and relief for asylum-seekers.

Since 2015, EU Member States have been on the receiving end of a large share of asylum claims. In 2014 to 2016, 48% of the world's 6.7 million asylum-seekers were registered in the EU. This warrants continued updating of EU asylum policies and procedures as well as a strengthening of external borders to enable Europe to better cope with sudden influxes of asylum-seekers in the future.

EU processes lion's share of global asylum claims

Decisions on asylum claims, 2014-2016
(Percent = recognition rate)



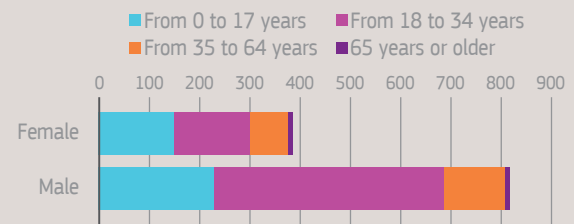
Source: United Nations High Commissioner for Refugees, Eurostat

PROFILES OF RECENT ASYLUM SEEKERS ENTERING EUROPE

Recent asylum-seekers are mainly young men, aged 18-36, while the number of unaccompanied minors has increased dramatically. **In 2015 and 2016, around 30% of asylum applicants in the EU were children.** This marked a six-fold increase in the total number of child asylum applicants compared to the previous six years. These refugee children are particularly vulnerable – another reason why irregular and uncontrolled flows need to be replaced by safe and well-managed pathways.

First-time asylum applications in the EU28 by gender and age, 2016

In 1,000s



Source: Eurostat

CLIMATE CHANGE TO DWARF ALL OTHER DRIVERS OF MIGRATION

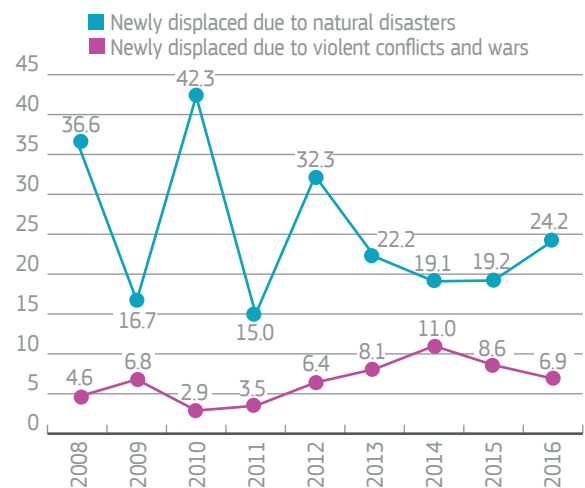
- **Climate change is reshaping the map of liveable areas worldwide:** rising sea levels, higher surface temperature, and disruptions in water cycles are making crop-killing droughts and flooding rains more common, and human survival more difficult.
- **Between 2008 and 2016, environmental disasters displaced 25.3 million people annually.** In total, extreme weather conditions, like hurricanes, floods, mudslides, forest fires and droughts forced 196 million people to flee their homes – and these figures relate only to people who were internally displaced.⁴
- In some cases, the duration of environmental displacement can be limited-less than or around 12 months-due to the short-lived nature of some natural events; but in other cases, environmental displacement can be protracted across several years.
- **Not all regions of the world are equally affected.** Coastal areas and some of the world's poorest regions, including large parts of Central and Southwest Asia, the Horn of Africa, or North Africa, are especially vulnerable.

Estimates range widely regarding future trends of environmental displacement by 2050: from 25 million to 1 billion people with a median of 200 million. **Any levels within this range would dwarf the current levels of new refugees and internally displaced persons.**

Additional research is required on the potential risks and appropriate responses to environmental displacement. The current global humanitarian system, already overstretched and underfunded at around 50% of global needs, would be difficult to extend automatically or with the same protections to those internally displaced by environmental disasters.

Many more people internally displaced by 'natural' disasters than by violent conflicts and civil wars

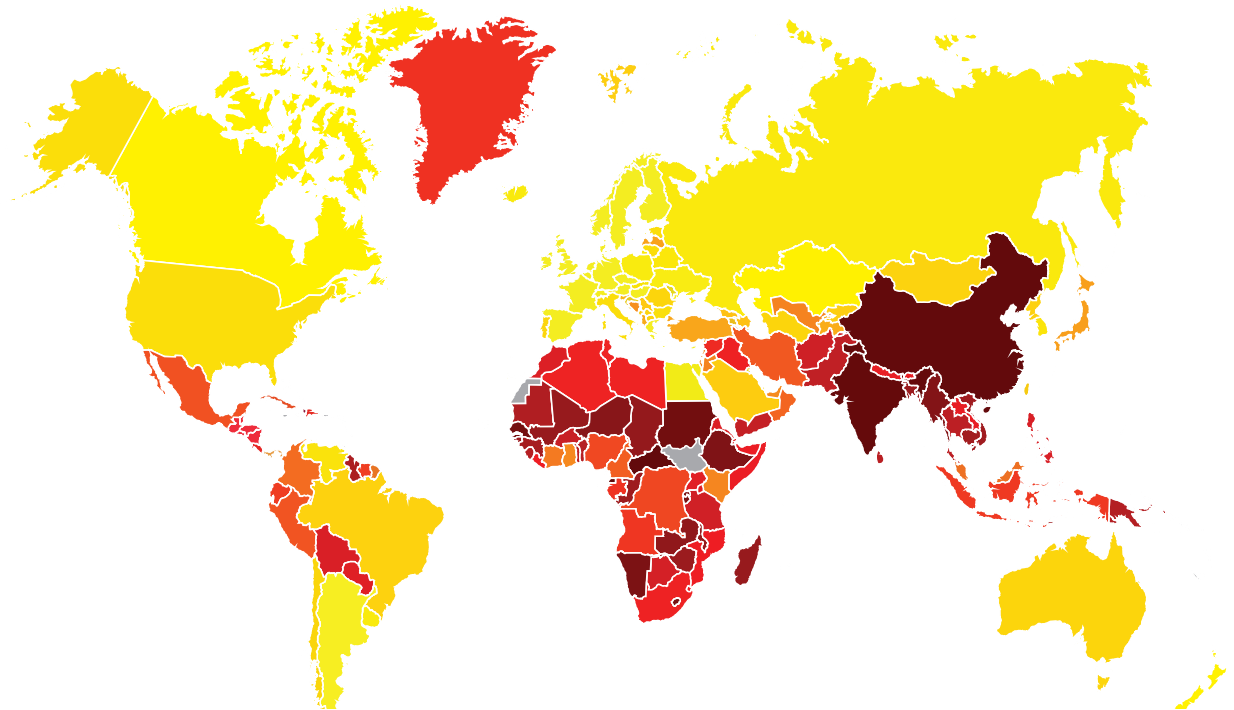
Internally displaced people, 2008-2016
In millions



Source: Internal Displacement Monitoring Centre

Climate change places the largest burden on already vulnerable regions

high risk ■■■■ low risk



Note: Risk refers to climate impacts such as extreme weather, sea level rise, agricultural productivity loss.
Source: Centre for Global Development

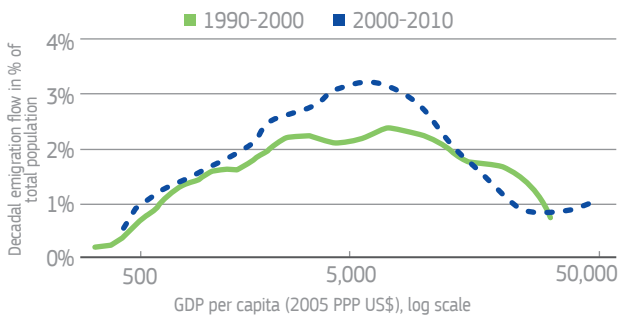
COPING WITH CLIMATE REFUGEES IN THE PACIFIC: NEW ZEALAND'S PROPOSAL FOR A VISA FOR 'CLIMATE REFUGEES'

Small islands emit less than 1% of global greenhouse gas emissions, but they suffer disproportionately from the effects of rising tides and extreme storms.⁵

In October 2017, New Zealand's climate change minister announced that the government was considering the creation of 'a new humanitarian visa for people displaced by climate change in the Pacific'.⁶ The experimental humanitarian visa category would target people from surrounding Pacific island-states who are displaced by rising sea levels stemming from climate change. If implemented, up to 100 individuals per year could be admitted to New Zealand.

ECONOMIC DEVELOPMENT SPURS MIGRATION IN THE SHORT-TERM

People's ability and propensity to emigrate increases with rising GDP per capita, up to a threshold

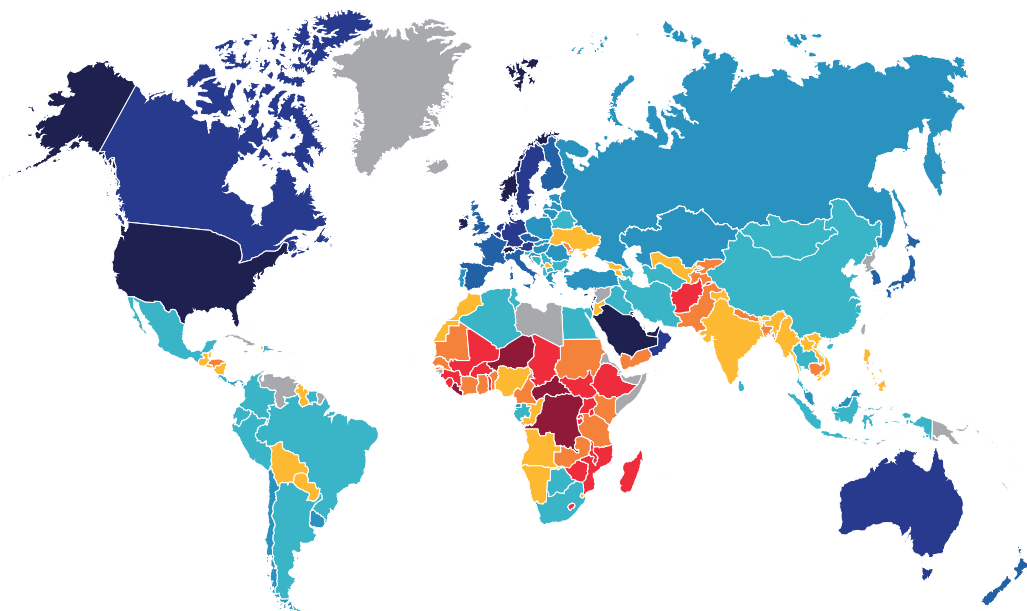


Source: United Nations, World Bank

- 16% of the world's adults would move to another country if they had the chance⁷: this equals roughly 700 million people. In reality, 7-9 million migrate each year – only 1% of those who would consider moving abroad.
- **The socio-economic factors that can motivate people to seek better opportunities abroad – poverty, inequality, lack of infrastructure and unemployment – are also the primary factors limiting their mobility.**
- This explains the hump-shaped relationship between income and migration flows. Extremely poor people lack the financial means to migrate. **With economic development**, up to a GDP per capita threshold of roughly 7,000-10,000 US dollars per year (measured in purchasing power parity (PPP))⁸, **people's ability and propensity to emigrate increases**. Once the tipping point is reached, the relationship is reversed and people are more likely to stay in their home countries.

A global map of income

Income per capita (in PPP US\$) per year around the world



Note: GDP per capita is adjusted for price changes over time and between countries. It is expressed in constant 2011 international dollars

Source: [World Bank](#)

MIGRANTS INCREASINGLY FINANCE THE ECONOMIC DEVELOPMENT OF THEIR HOME COUNTRIES

Emigration itself is a strategy to support economic development in poorer countries.

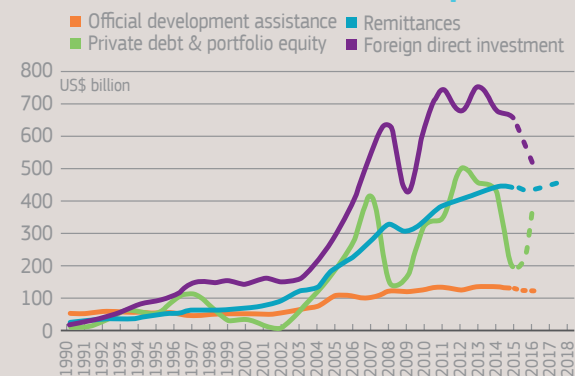
As migrants settle abroad, they send remittances – payments to family in their country of origin – which contribute to enhancing living conditions back home. While official development aid requires complex coordination of government agencies and policymakers, remitted money can move with expediency and directly reaches the recipients in need. Remittances are stable and have proven resilient to economic downturns.

As the total number of migrants living and working abroad has grown, **remittances have risen steadily over time, outpacing official development aid (ODA), and are now three times as large as ODA.**

Ideally, remittances can complement official overseas development aid to reach the threshold of income at which people's propensity to emigrate is expected to fall. Fostering this virtuous cycle must be enabled to help tackle the root causes of migration. Yet today, the cost of sending remittances continues to be excessively high. The global average transaction cost of sending remittances of US\$200 is 7.45%, well above the target of 3%, as recommended in the UN Sustainable Development Goals. For smaller amounts, relative costs are even higher.⁹

Going forward, it is important to shape the regulatory and market landscape in the direction of reduced hurdles, more competition, transparency and increased use of digital technology. Mobile money-based global remittances are growing at a fast pace, especially in East Africa and South Asia, where the proliferation of smartphones has made online transfers cheaper and more convenient. The application of blockchain technology is still in its infancy, but also holds great potential for overcoming the high cost of transmitting money.

Remittances dwarf official development aid



Sources: World Bank staff estimates, World Development indicators.

TREND 5

THE EVER-CHANGING FACE OF MIGRATION

- Throughout history, Europeans have emigrated to the rest of the world. Since the second half of the 20th century, **Europe has become a continent of immigration.**
- Patterns of migration from, towards, and within Europe have undergone significant changes as international migration has become more **globalised, mobile, connected and distant.**
- This has resulted in a population with migrant background that is **highly diverse** in terms of countries of origin, ethnic and religious backgrounds, cultural practices and languages – especially in the North, West and South of Europe.
- Migration has also become more **complex.** Today, migration is characterised by mixed flows and mixed motives, increasingly compounded by emerging challenges, like climate change.
- Moreover, given the limited legal pathways that are available for economic migrants to come to Europe, there has been a growing trend of irregular entry or stay, and a growth in asylum applications in order to gain entry and a legal status.

- The different pathways that migrants use to come to Europe – regular, irregular, smuggled or trafficked – also affect their legal status and integration into the receiving country, further adding to the complexity of migration management.¹⁰

Migration will remain a defining issue for the EU for the years to come.

It is therefore pressing to try to curb irregular migration and instead develop well-managed legal migration pathways so that Europe can address the challenges linked to a shrinking working age population while attracting the specific skills needed in the EU's economies, and upholding its international humanitarian responsibilities.

Migration today is more:

Globalised	Mobile	Connected	Diverse
Migration has become much more diverse in terms of origins and destinations of migrants.	Technological change has lowered resource constraints on mobility – the threshold levels of wealth required to move – by bringing down costs of travel and communication.	Technology has strengthened migrant networks and transnational ties by making it easier to stay in touch with family and friends, to remit money, and to travel back and forth between destination and origin countries.	There is a diversification in terms of migration categories, including labour, student, family, and asylum migration as well as patterns such as temporary, permanent, seasonal, cyclical, or transnational.

Source: European Political Strategy Centre

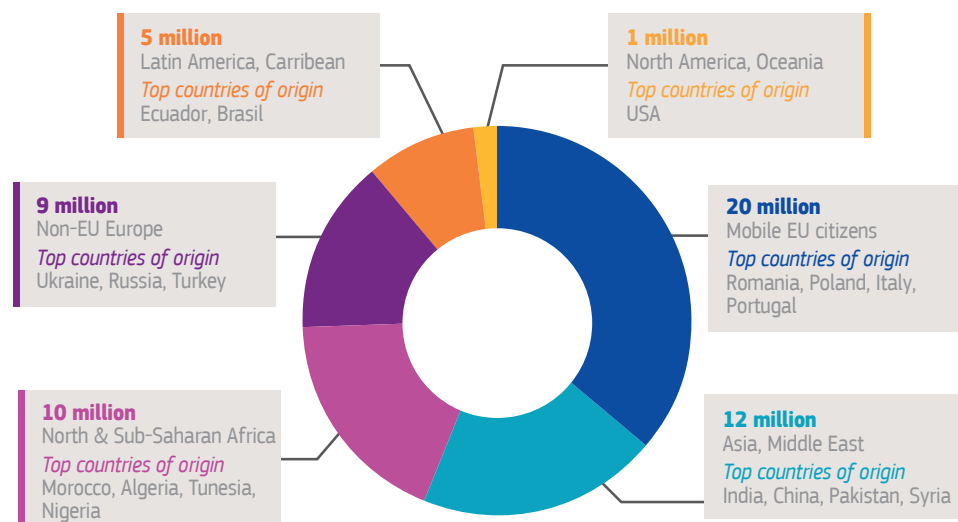
FOUR PHASES OF MIGRATION WITHIN AND TO EUROPE

	Between the 1950s and the 1974 oil price shock (1950s-1974)	Between the oil price shock and the end of the Cold War (1974-1989)	Post-Cold War era until 9/11 (1989-2001)	From 9/11 to today (2001-2017)
Who	<ul style="list-style-type: none"> • Guest workers, mainly men • Post-colonial • Refugees 	<ul style="list-style-type: none"> • Dependent family members • Refugees 	<ul style="list-style-type: none"> • Dependent family members • Refugees • Students • Co-ethnics 	<ul style="list-style-type: none"> • Dependent family members • Irregular migrants • Refugees • Students • High-skilled workers
Why	<ul style="list-style-type: none"> • High demand for low-skilled labour as part of the post-war reconstruction • Legal labour recruitment organised between state authorities or big companies (manufacturing, mining) in the receiving countries and the sending countries • Political asylum granted in Cold War antagonism 	<ul style="list-style-type: none"> • Oil crisis halts need for labour recruitment, ending guest-worker migration and introducing stringent entry restrictions for new migrants • Legal migration continue through family reunification • Political asylum granted in Cold War antagonism 	<ul style="list-style-type: none"> • Re-connection of Europe; surge of East-West migration with no structured legal entry pathway developed, except for privileged co-ethnic migration • High and mid-skilled migrants mostly overstaying tourist/student visas; growth of undocumented and irregular migration • Seasonal/circular migration to fill jobs in the lower-skilled, labour-intensive and volatile sectors of the economy (agriculture, construction, tourism and home care) 	<ul style="list-style-type: none"> • Surge in low-skilled undocumented migrants entering irregularly or with tourist visas • Mixed flows of refugees and economic migrants • Emerging trend of unaccompanied minors • Rise in female migrants as main breadwinner (rather than through family reunification) • Targeted strategies to attract high skill migrants
From where	<ul style="list-style-type: none"> • Countries of origin mainly Southern Europe, Turkey and Morocco • Facilitated entry and stay for returning colonial settlers and nationals of newly independent countries in Africa and Asia associated with decolonisation 	<ul style="list-style-type: none"> • Family reunification from Southern Europe, Turkey, Maghreb and South Asia • Asylum seekers from Central Europe and from Turkey 	<ul style="list-style-type: none"> • Central and Eastern Europe • Asylum seekers from Western Balkans, Algeria and Chechnya 	<ul style="list-style-type: none"> • South Asia, China • Afghanistan, Iraq, Syria • Maghreb and Sub-Saharan Africa • Ukraine

Source: European Political Strategy Centre

Where do Europe's migrants come from?

Total foreign-born communities by continent of origin in EU28, Top countries of origin 2016



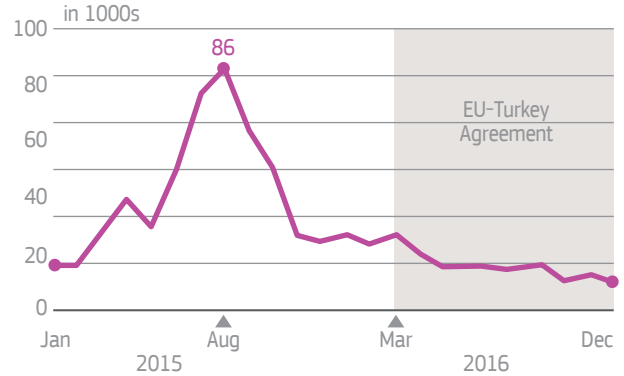
Source: Eurostat, European Political Strategy Centre

DIGITAL IS A GAME CHANGER FOR MIGRATION

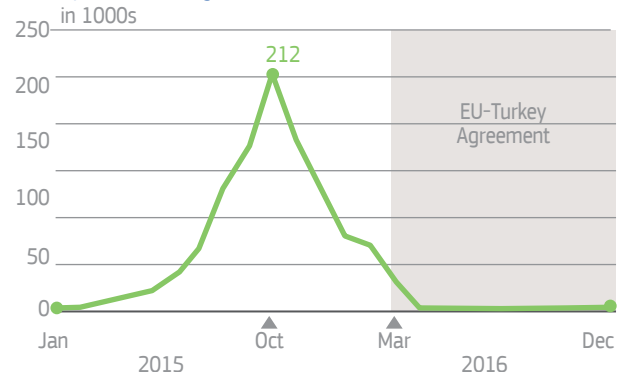
- While only a fraction of those who express a willingness to move actually do, **greater connectivity to the world seems to drive individual aspirations.** Modern information technologies and social media platforms open up flows of information that were not readily available in the pre-Internet age. Digital connectivity not only exposes migrants to alternative lifestyles, it enables them to actively research migration options and destinations.
- For those determined to migrate, **digital technologies also fundamentally alter the way migration journeys are undertaken.** Smartphone geo-localisation applications help irregular migrants on their routes; while smugglers are able to advertise their services on social media platforms – and can even be rated by migrants having already made the journey. **Some migrants spend up to a third of their disposable income on mobile phones¹¹** and other means of connectivity, to avoid an ‘informational no-man’s-land’.

Correlation between surges in searches for ‘Greece’ in Turkey and surge in monthly arrivals of migrants into Greece in the summer 2015

Google Trends: Relative volume of Arabic-language Google searches for ‘Greece’ by users in Turkey



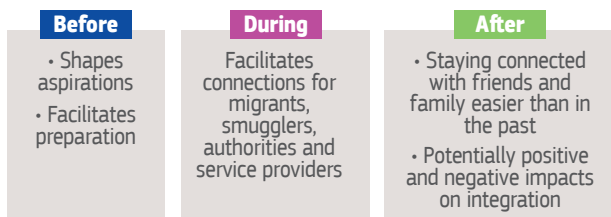
Monthly arrivals of migrants into Greece



Note: Google trends data do not indicate the number of searches but instead are standardised data, displaying the relative change in searches over the time period on a 0 to 100 scale. Google trends are monthly averages based on weekly volume. Search data are for the term ‘Greece’ in Arabic. Arrivals into Greece are for all nationalities, not only Arabic speakers.

Source: Pew Research Center analysis of Google Trends (accessed on March 3, 2016 at 1:17pm) and United Nations High Commissioner for Refugees (UNHCR) data, accessed March 13, 2017.

Digital tools matter throughout a migration journey



Source: European Political Strategy Centre

- **The game-changing role of new digital technologies does not end upon arrival in a host country.** The 2015-2016 period saw an explosion of social and technological innovations to address the challenges posed by large numbers of asylum-seekers and migrants arriving in Europe. In particular, digital technologies were mobilised to help newcomers navigate local services; get them into work or training; and provide access to community-based housing and services.¹ Authorities and humanitarian organisations are also harvesting the wealth of online data to improve their decision-making process and adopt a more anticipatory approach to migration.¹²
- Yet, in a context of limited integration perspectives in countries of destination, these digital tools also have the potential to further slow or complicate integration efforts by creating 'bubbles', that enable new arrivals to be more virtually immersed in their community and country of origin than with the receiving society.

DIGITAL TECHNOLOGY, A TOOL TO SUPPORT INTEGRATION EFFORTS

In Germany, the Federal Office for Migration and Refugees developed, in cooperation with the Federal Employment Agency and the Goethe-Institut, the [Ankommen](#) app, which means 'Arrive'. It provides translated information about basic integration services, such as an introduction to the German language, information on asylum procedures and studying, as well as on cultural practices and values in Germany.



Private actors and civil society organisations also developed innovative, digitally-supported tools and applications to support refugee integration in the midst of the unprecedented inflow of refugees and migrants in the summer 2015. Amongst the most notable examples were those set up to match newcomers with people offering spare rooms, like [Airbnb's 'Open Homes'](#) scheme, which enabled willing local residents to offer free and temporary shelter to refugees, and those like [Home4Refugees](#), a platform to connect refugees looking for rental opportunities with refugee-friendly landlords and homeowners.

MIGRATION | BECOMING BIG BUSINESS | WITH BOTTOMLESS DEMAND

- The majority of irregular migrants arrive in Europe with valid tourist visas or are visa-free travelers who do not leave within the typically foreseen 90-day period, but try to find work.
- For those with no access to Schengen visas, stricter border controls and reduced opportunities for legal migration have encouraged attempts to enter the EU irregularly.
- **More than 90% of irregular migrants** reaching the EU via the Mediterranean **use the facilitation services of a migrant smuggling network** at some point during their journey.¹³
- **The spread of digital technologies has supported the growth of an irregular migration industry**, with smuggling networks using social media to advertise their services and painting a positive picture of what are in reality high-risk, treacherous journeys. For every fifty people arriving in Europe via the Mediterranean, one loses their life.
- Yet, driven by substantial demand, smuggling has, in a very short time, become a highly lucrative business – with relatively low risk for the smugglers. **Criminal networks are estimated to have made a turnover of EUR 4-6 billion in 2015 alone, helping irregular migrants and refugees to reach Europe.**¹⁴
- Migrant smuggling is increasingly associated with serious human rights violations and deaths, mainly across the Sahara, but also at sea, while smuggling networks are linked to other forms of serious and organised crime, including money laundering, drug and human trafficking, even slavery.

Tackling smuggling requires a holistic approach to irregular migration. Focusing on just one part of the journey has the risk of backfiring. The spread of maritime surveillance and rescue operations in the Central Mediterranean are telling in this respect. What was meant as a humanitarian intervention – bringing rescue operations closer to the shores of Libya to save lives – in fact made it easier and cheaper for smugglers to organise crossings. In particular, smugglers started placing people on ever cheaper and more unseaworthy inflatable dinghies that never had the prospect of reaching Europe. Their business model ran on the expectation that people crossing by sea would be picked up by rescue boats – either official vessels or NGO ships – and then receive safe passage to Italian ports.

For every 50 arrivals to Europe via the Mediterranean, one person died at sea in 2017

	2014	2015	2016	2017
 Sea arrivals via the Mediterranean	216,054	1,015,078	362,753	160,879
 Dead and missing in the Mediterranean	3,538	3,771	5,096	3,049
Proportion of fatalities vs arrivals	1.6%	0.4%	1.4%	1.9%

Source: United Nations High Commissioner for Refugees

Interactions between Smugglers and Clients via Social media

Target audience	Somalis & Eritreans	Syrians & Iraqis	Afghans	West Africans
Social media use pre-departure	some	yes	no	some
Social media use on route	yes	yes	some	too expensive, rather text messages
Social media use upon arrival	yes	yes	yes	yes

Source: Melita H. Sunjic, United Nations High Commissioner for Refugees Europe, Head of Unit, Communicating with Communities. Myria Rapporteur on trafficking (text published in French: <http://www.myria.be/fr/publications/rapport-annuel-2017-traite-et-traffic-des-etres-humains-en-ligne>).

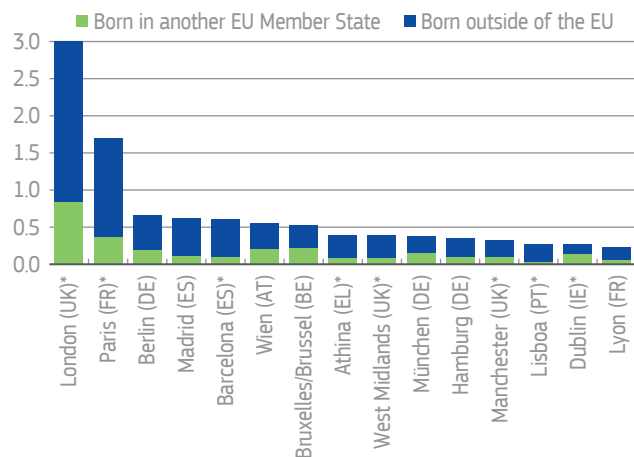


MIGRATION CONTINUES TO BE AN URBAN AFFAIR

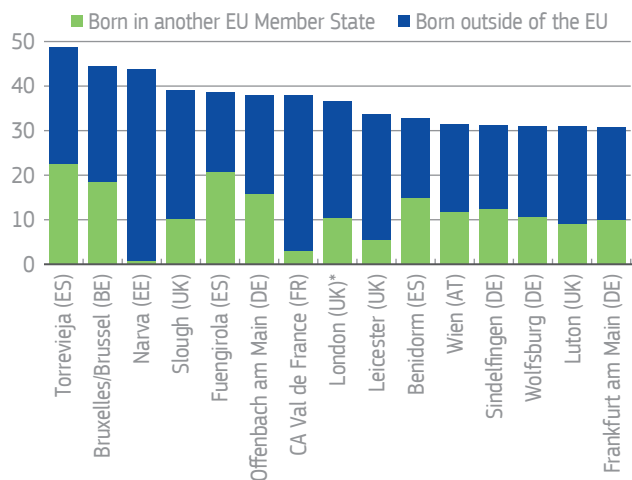
- Urbanisation is a long-term accelerating trend. Today, 54% of all people live in urban areas. This share is expected to increase to 66% by 2050. Much of the predicted urban growth will happen in developing regions – particularly in Africa – but Europe can also expect rising levels of urbanisation, with migrants playing an important role.¹⁵
- Today, nearly **one in five migrants live in the world's top 20 largest cities**.
- Cities have always been the first points of arrival, transit hubs and ultimate destinations for migrants, and migrants in turn have shaped and contributed enormously to cities and urban economies.
- The difference in recent and coming years is the increased scale of migration into cities. **Publicly financed goods and services** such as affordable housing, education, social services, and healthcare **are already under pressure – especially after the financial crisis – and now face additional demands from migrants and refugees.**
- **The nature of services needed is also changing, with a higher demand for specialised approaches** for vulnerable people, including the large number of unaccompanied minors. At the same time, public authorities face additional burdens, such as better responses and preparedness mechanisms against radicalisation or xenophobic protests.

Foreign-born inhabitants living in selected EU cities, 2014

Foreign-born population (millions)



Share of foreign-born population in total number of inhabitants (%)



* the figure shows 15 cities (subject to data availability) in the EU28 with the highest number of foreign-born inhabitants and the 15 cities with the highest share of foreign-born inhabitants.

Estonia and Austria: data from 2013. Germany, France, and Slovenia: data from 2012. The Czech Republic, Ireland, Greece, Latvia, Hungary, Poland, Portugal, Sweden and the United Kingdom: data from 2011.

Source: Eurostat

RESILIENT CITIES

The rising numbers of refugees and asylum-seekers in Athens and Thessaloniki are part of a global trend: forcibly displaced populations migrating to cities.

While the humanitarian sector is turning its focus to adapting aid to better suit the 60% of refugees residing in cities around the world, too little attention is given to strategies cities themselves can take, particularly given that it is their communities, services, and systems that bear the greatest burden.

In 2016, there were an estimated 59,000 refugees and asylum seekers in Greece. In Athens alone, 9,000 refugees and asylum-seekers rely on city services and Athenian empathy, while Athenians themselves struggle with a 21% Greek unemployment rate.

The city's Chief Resilience Officer has underlined the need to move from crisis response to urban integration: 'Athens is in a dress rehearsal for the types of migration crises cities will have to deal with in the decades to come. Cities are increasingly at the forefront of migration, and therefore should be at the forefront of integration solutions'.

Cities also host a wave of social innovations related to improving access to information and services for migrants and asylum seekers. In effect, most arrive with few resources, limited host language skills and different cultural perceptions. Employer associations, NGOs, companies, trade unions, charities and religious associations have come together with municipal services in partnerships aimed at finding efficient ways to help new arrivals access information directly, and facilitate their integration in the local communities.

Source: [100 Resilient Cities](#)

TREND 9

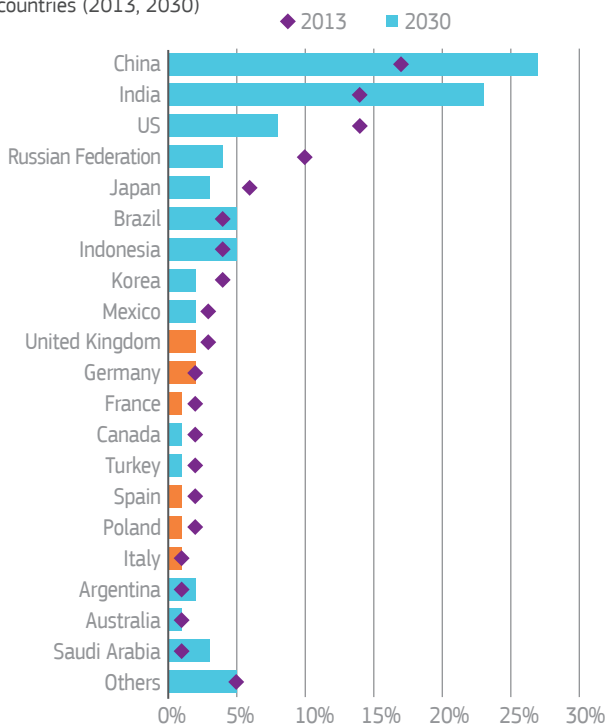
EUROPE'S UNMET POTENTIAL TO ATTRACT WORLD'S HIGHLY SKILLED

- More than ever before, human capital is the one resource that can propel firms and economies to higher levels of productivity and competitiveness. **Globalisation has fostered a global competition for talent**, as knowledge economies increasingly rely on highly-skilled workers.
- Already today, **Europe faces a significant skills shortage**, a trend that will be compounded by a shrinking pool of university graduates between now and 2030. In fact, half of the world's share of 25-34 year olds with university degrees will graduate in China and India, while those in the US and the EU will account for just over 15%.

- To minimise the negative impacts of an ageing and shrinking population and ensure sustainable growth, European economies will need to consider attracting young economic migrants. Yet, **only a fraction of migrants enter the EU for employment today**; more than half of legal migration flows into EU Member States are driven by family reunification or humanitarian grounds (including refugee status).
- Compared to similar economies like the US, Canada or Australia, Europe also attracts a smaller share of highly-skilled migrants relative to the total global flow of highly-skilled migrants. In 2013, the EU was home to only one in three high-skilled migrants, with 60% heading to North America.

By 2030, China and India will be home to half the world's new graduates

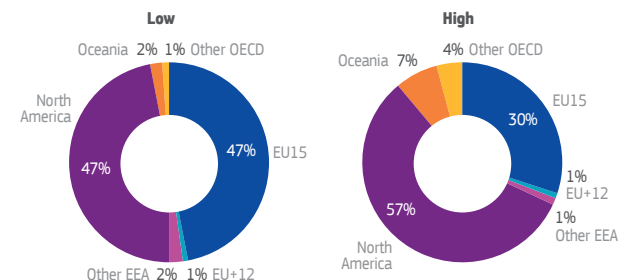
Share of 25-34 year olds with a tertiary degree across OECD and G20 countries (2013, 2030)



Source: Organisation for Economic Co-operation and Development (OECD) database, United Nations Educational, Scientific and Cultural Organisation (UNESCO) and national statistics websites for Argentina, China, India, Saudi Arabia, and South Africa.

Europe is an underachiever in the global competition for talent¹⁶

Data for 2013



Source: Organisation for Economic Co-operation and Development (OECD)

THE EUROPEAN BLUE CARD EXPERIENCE – A DROP IN THE OCEAN

Attracting highly qualified immigrants to Europe has been a key priority for the EU for several years. So far, it has not been as successful as other comparable economies in attracting the highly-educated individuals it seeks.

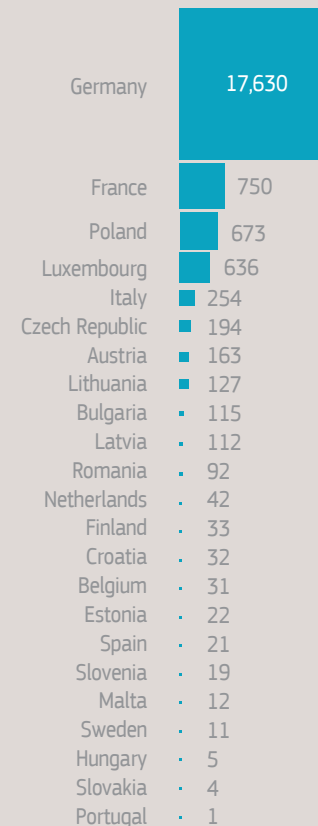
The 2009 Blue Card Directive introduced a specialised scheme giving highly-qualified workers from outside the EU the right to live and work in an EU country, provided they have higher professional qualifications, such as a university degree, an employment contract or a binding job offer with a high salary compared to the average in the EU country where the job is.¹⁷

To date, the scheme has proven unattractive. In 2016, EU Member States jointly granted just under 21,000 Blue Cards – up from 3,664 granted in 2012, but these figures are ‘drops in the ocean’ compared to the global dimension of the ongoing competition for talent. What’s more, the overwhelming majority of these Blue Cards were granted by a single Member State: Germany.

Restrictive admission conditions and the existence of parallel national schemes are the main barriers to wider use of the Blue Card. In June 2016, the European Commission proposed improvements to the scheme, including less stringent admission criteria (e.g. a lower salary threshold and shorter required length of work contracts), better family reunification conditions, facilitated mobility, and the abolishment of parallel national schemes. The final trialogue on this revision is scheduled for 14 December 2017.

A Drop in the Ocean: Germany Leads on Blue Cards

Blue Cards Granted, 2016



Source: Eurostat

Europe boasts the assets that would attract the world’s best and brightest, but performs less well on factors to retain talent

Factors that attract

Primary drivers

1. Opportunity
2. Infrastructures
3. Other talented people

Wider environment

1. Fair social model
2. High quality of life
3. Tolerant and inclusive societies



Challenges to retain

1. Opportunities for permanent residency
2. Recognition of foreign credentials
3. Opportunities for family members
4. Taxation and uncompetitive salaries

Source: European Political Strategy Centre, based on Migration Policy Institute, Talent in the 21st Century Economy, 2013

Attracting skilled individuals is not just the domain of immigration and visa policy, but also depends on the success of policy efforts in other fields.

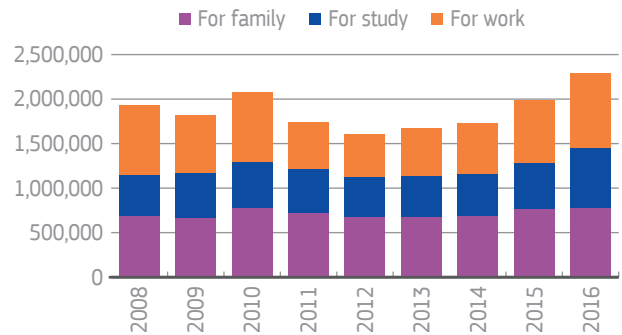
PERCEPTIONS AND FACTS MATTER

- **Immigration surged on the list of top concerns of European citizens since 2014**, peaking at the end of 2015, at the height of the humanitarian crisis, when 58% of Europeans said that immigration was the most important issue facing the EU. **Today, it is second only to terrorism.**
- Negative sentiment was initially fuelled by the major spike in irregular arrivals, with more than 1 million irregular migrants and asylum seekers disembarking at Europe's Mediterranean and Atlantic shores in 2015.
- While Europe may have partially regained control over the situation today (with irregular sea arrivals dropping to 360,000 in 2016 and to 160,000 in 2017), **the perception of poorly managed migration and of a limited success at integrating migrants and refugees at national and local levels persists.**
- These issues have dominated electoral campaigns across Europe and abroad, influencing crucial votes, such as the UK's referendum on Brexit, recent elections in Austria, France, Germany, the Czech Republic, or the Netherlands, and even in the US, with anti-immigration parties gaining ground and mainstream parties often jumping on the bandwagon for more restrictive migration policies.
- **Growing concern about immigration cannot only be explained by the increased numbers of people migrating to Europe.** Research suggests that fears are often exaggerated by widespread misperceptions regarding actual figures and facts. On average, people overestimate the size of immigrant populations living in their country, often by a wide margin.

- At a time when fewer people get their news from evening broadcasts and newspapers, and with many turning to alternative online sources of information, there is risk of exaggeration, which in turn can exacerbate anti-immigration sentiment, also by linking migration to illegality, economic crisis, or even radicalisation and terrorism.

Regular migration to the EU28 is rather stable...

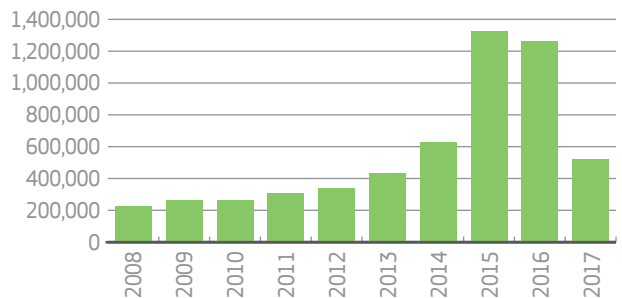
First permits issued, 2008-2016



Source: Eurostat

...But asylum applications have seen a spike

Asylum applications in EU28 from 2008 to October 2017

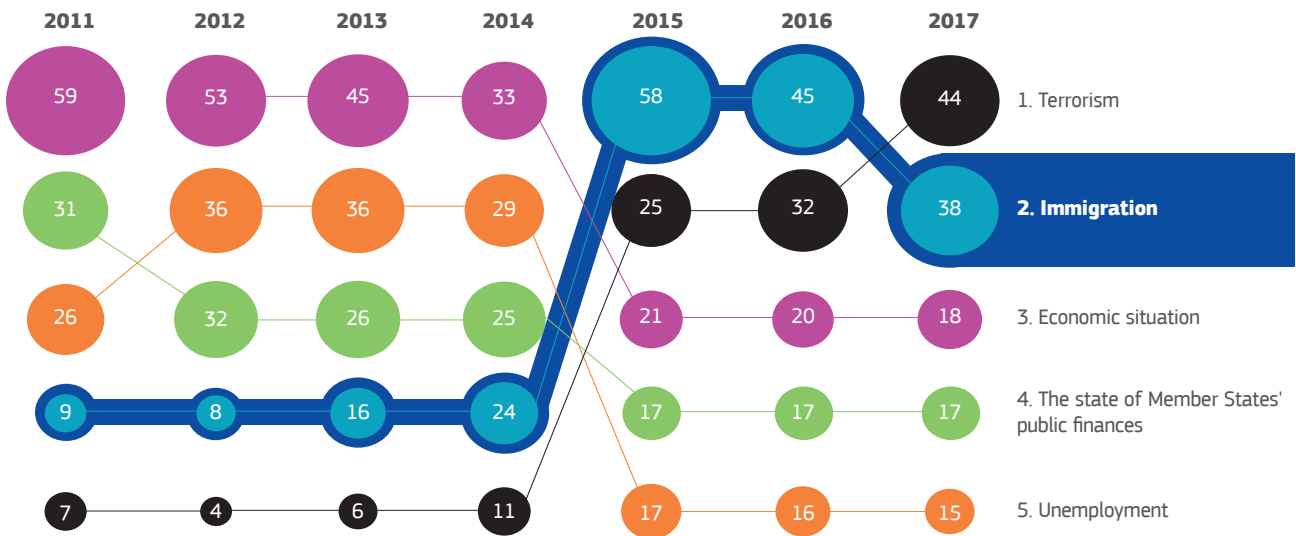


*Data for 2017 are up to October or latest available

Source: Eurostat

Most important issues of concern that the EU is facing, 2011-2017

in %



Source: Eurobarometers 79 to 87

Note: Up to two priorities could be mentioned in the interview

ATTITUDES TOWARDS MIGRATION ARE RELATED TO PEOPLE'S PERCEPTIONS OF THEIR COUNTRY'S ECONOMIC CONDITIONS

- In nearly all regions around the world, people who assess the economic situation of their country as 'excellent' or 'good' are more likely to have a positive outlook on migration than those who consider it is 'fair' or 'poor'.
- Those who consider that conditions are worsening are nearly twice as likely to favour decreased immigration than those who consider conditions are improving (48.0% vs. 25.3%).¹⁸

People usually overestimate the share of migrants living in their country

Responses to the question: What percentage of the country's population do you think are immigrants?

	Actual	Estimate	% point difference
Italy	7	30	+23
US	13	32	+19
Belgium	10	29	+19
France	10	28	+18
Hungary	2	16	+14
Canada	21	35	+14
Poland	2	14	+12
Great Britain	13	24	+11
Spain	12	23	+11
Germany	13	23	+10
Japan	2	10	+8
South Korea	2	10	+8
Sweden	16	23	+7
Australia	28	35	+7

Source: Ipsos Mori, 2016 'Perils of Perception', <https://www.ipsos.com/ipsos-mori/en-uk/perceptions-are-not-reality-what-world-gets-wrong>

Notes

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European **Political Strategy** Centre

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