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Labour Migration Responses to the COVID-19 Crisis in Europe and North Africa

Hervé Nicolle, **SAMUEL HALL**



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August 2021

Author: Hervé Nicolle, SAMUEL HALL



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Picture 1: Credit AFP, Labour Migration to Europe

CONTEXT AND BACKGROUND

The ongoing COVID-19 crisis has shaken up existing labour migration trends and, more specifically, the recruitment and placement of national workers abroad, as well as the socioeconomic integration of foreign workers into national labour markets. The presence of the virus has profoundly slowed, if not halted, human mobility, and it is increasingly likely that population movements - whether for economic migration, asylum-seeking or simply tourism - will be restricted in the coming months and years. This applies in particular to both sides of the Mediterranean. As Schöfberger and Rango (2020) explain, the health pandemic *'has dramatically changed the global migration and mobility landscape and added a layer of complexity to migration in West and North Africa and across the Mediterranean'* in a relatively short period of time.¹

The pandemic has exacerbated salient and often ignored failures of migration governance within and between Europe and North Africa: as global lockdowns and social distancing measures are enforced, closure of borders and travel bans have greatly limited mobility, significantly affecting cross border movement and informal trade, and putting a further spotlight on discriminatory policies and possible outbreaks of xenophobia. On one hand, for North African sending countries – mainly Egypt, Morocco, Tunisia, Libya and Algeria – there are new challenges to face: job losses, a decline in remittances, and returning migrants who need to be reintegrated, all of which add to the already high rates of unemployment especially amongst the youth. On the other hand, European destination countries are grappling with how to ensure that workforce shortages in critical sectors are filled rapidly, to prevent further economic recession. It is still unclear if this appreciation will lead to more acceptance of migrants, in addition to the current move towards regularisation in some countries.²

In this regard, COVID19 might provide an opportunity to reflect on how migration cooperation can better take into account the interests and priorities of African countries and their citizens.³ As a follow up to the first THAMM (Towards a Holistic Approach to Labour Migration Governance and Labour Mobility in North Africa) Regional Conference, this discussion paper on labour migration responses to the COVID-19 crisis in Europe and North Africa is aimed at gaining a better understanding of the key trends that are currently shaping labour migration governance in a time of crisis and affecting the socioeconomic integration of foreign workers into labour markets, in order to inform the design and implementation of programme activities in North Africa. As the THAMM programme focuses on both South-North and South-South migration patterns, the paper addresses both dimensions and emphasise the differential impacts of the pandemic on each mobility pathway. The present scoping paper aims to achieve the following:

1. Stock-taking of current labour migration and mobility trends observed within and between North Africa and Europe, with special attention given to socioeconomic vulnerabilities and protection gaps, and how these challenges may be addressed by THAMM and regional stakeholders more broadly;
2. Identification of lessons learned and space for further research relative to labour migration trends, taking into consideration the 2021 EU agenda on talent and the future of work;
3. Formulation of concrete and pragmatic policy recommendations based on the discussions of the THAMM Conference, and contribution to strengthening legal pathways for labour migration and the protection of migrant workers sustainably in times of crisis.

1 Schöfberger, I. and Rango, M. (2020) COVID-19 and migration in West and North Africa and across the Mediterranean. FULL reference In final version please

2 Many governments, from Southern Europe in particular, took immediate action to open borders to agriculture and food processing workers, issue visas when needed and regularize undocumented migrant workers during the crisis. The Italian government has extended the residence permit to non-EU citizens already living in Italy. Portugal recognized all migrant workers and asylum seekers with pending applications as permanent residents, providing

them with a temporary residency permit so that they could have access to health care services, welfare benefits, bank accounts, and work and rental contracts. Spain introduced an extension of residency and work permits for foreigners in the context of the declared COVID-19 Emergency, which could lead to regularization pathways.

3 Raty, T. and Shilhav, R. (2020) The EU Trust Fund for Africa, Trapped between aid policy and migration politics, OXFAM.
<https://oxfamlibrary.openrepository.com/bitstream/handle/10546/620936/bp-eu-trust-fund-africa-migration-politics-300120-en.pdf>

MOBILITY DYNAMICS IN NORTH AFRICA

North African countries have historically been significant *hubs* of migrant destination, transit and departure. Economic, social, political as well as climate instability *have contributed* to the mixed migration patterns observed in the region. Labour migration policies from as early as the 1950s incentivized mobility and made it a cornerstone of national and regional socioeconomic development. However, local labour markets remain fragmented due to several cleavages (public/private, formal/informal and modern/traditional) and still *'characterised by significant informality and precariousness, very low female participation, high unemployment and significant agricultural employment'*.⁴ The share of the population under the age of 30 years has exceeded 60%, and the working-age population (15-64 years old) is approaching 70%.⁵ The main key explanatory factors for the region's endemic unemployment are: 1) the lack of demand and low job creation; 2) demographic pressure with a working-age population of 70% for the whole area; and 3) the persistent *'skills mismatch between the education system and the labour market thus contributing to limited employability'*.⁶

Socioeconomic and migration dynamics in North Africa – country analyses

This section first highlights key socioeconomic trends in North Africa – with a comparative focus on Morocco, Algeria, Tunisia, Egypt, and Libya – before synthesizing national characteristics and mobility-related issues using WB data and ILOSTAT estimates.

Morocco

With a population of 36 million and a base of 27% under the age of 15, compared to 34% in 2000, Morocco is going through an important phase of demographic transition.⁷

The overall unemployment rate in Morocco remains significantly high (9.5% in 2015 and 10.2% in 2020).⁸ According to the HCP⁹ these figures vary considerably when broken down by: 1) gender, with unemployment rates of 14.3% for women versus 8.5 for men in 2020,¹⁰ and 2) age, with 26.8% of unemployment for the 15-24 year old segment in 2016 (+10.5 percentage point compared to 2007).¹¹ According to the ILO, the employed population in a situation of underemployment linked to the number of hours worked reached 443,000 people with a rate of 4.1%. The population in a situation of underemployment linked to insufficient income or the mismatch between training and the job performed is 511,000 people (4.7%). In sum, the volume of underemployment, in its two components, is almost one million people. The overall rate of underemployment fell from 9.7% to 8.8% at national level, from 8.8% to 8.7% in urban areas and from 10.7% to 8.9% in rural areas. Finally, the percentage of young graduates who cannot find a job remains very high (17.8%), which validates the assumption that it is still difficult to value diplomas and skills in a market still dominated by informality and personal relationships. In this context, the lack of job opportunities, especially for Moroccan youth, is one of the main reasons why people emigrate in hopes of finding better opportunities in Europe: *'for me it was out of the question to go and look for a job elsewhere than in my country, but I stayed for months without a job and I was losing my skills (...) At one point I had no choice but to leave'*.¹²

On the economic front, the shock of COVID-19 has pushed the Moroccan economy into its first recession since 1995 with a real GDP contraction by 7.5% in 2020, *'primarily as a result of the lockdown but also of a sharp reduction in exports caused by the pandemic's disruption to global value chains and the collapse of receipts from tourism (...)*

4 Castagnone, E. and Termine, P. (2018). Chapitre 7 - Migration des jeunes ruraux méditerranéens : déterminants socio-économiques, défis et opportunités pour l'élaboration de politiques ciblées, in CIHEAM éd., MediTERRA 2018: Migrations et développement rural inclusif en Méditerranée (pp. 145-167). Paris: Presses de Sciences Po.

5 UNDESA (2020) Data for North Africa
<https://www.un.org/development/desa/pd/content/international-migrant-stock>

6 Castagnone, E. and Termine, P. (2018). Ibid.

7 World Bank – ILOSTAT –

<https://data.worldbank.org/indicator/SL.UEM.TOTL.ZS?locations=MA>
8 Idem.

9 HCP (2020) Situation of the labour market in the first quarter of 2020, Haut Commissariat au Plan, Royaume du Maroc.

10 Idem.

11 Idem.

12 Focus Group Participant, Moroccan youth, 24 (Nanterre, France).

compounded by the fall in agricultural production due to a severe drought.¹³ As highlighted in a COVID-19 rapid assessment conducted by the AfDB and the ILO, in a context where almost 80% of micro and small enterprises (SMEs) employing 60% of the national workforce are informal, many Moroccan enterprises have suffered from this confinement, given the greater difficulty of accessing cash resources and finance. The positive trend of job creation observed in recent years in all sectors has been broken. The Moroccan economy lost 432 000 jobs in 2020 compared to 2019. In the agricultural sector, the annual loss – compounded by a prolonged drought – was 273,000 jobs compared to only 90,000 jobs over the 2017-2019 period. In the booming tech sector, the picture is more contrasted: on the one hand, the containment resulted in temporary or permanent stoppages for nearly six out of ten businesses and reduced activity for one fifth of businesses.¹⁴ A follow-up Enterprise Survey conducted by the World Bank in Morocco after the outbreak, on the impact the pandemic is having on the formal private sector shows that 6.1% of surveyed formal sector firms are reported to have ceased their operations, and as many as 87% report a fall in sales of, on average, 50% of their pre-pandemic level. By contrast, start-ups active in the e-commerce, EdTech and fintech industries have been able to benefit from the crisis.

Box 1: Morocco's institutional efforts towards better migration governance

Morocco alone, out of all the countries in the region, was granted by the EU the position of special partner in 2008. The document on Morocco's "advanced status" defined its objectives as *'supporting the internal dynamics which Morocco is experiencing and accelerating the partnership between Morocco and the European Union'*.¹⁵ In 2013, Morocco signed a mobility partnership agreement with the EU and a number of EU member states (Belgium, France, Germany, Italy, the Netherlands, Portugal, Spain, Sweden, and the United Kingdom) to manage the movement of people over short periods of time, improve legal migration channels and formal labour migration, and strengthen cooperation on migration and development. In 2014, Morocco implemented the

National Immigration and Asylum Strategy (SNIA) as well as the National Strategy for Moroccans of the World (SNMDM) as part of its New Migration Policy (NPM). The SNIA aims to contribute to a better integration of regular migrants in Morocco. The NPM focuses on several areas of intervention (education and culture, youth, health, housing, social and humanitarian assistance, vocational training and employment, and anti-trafficking). Basic services (education, emergency care, the right to health and legal protection) are provided to all, regardless of their administrative status. Other services (regarding employment and vocational training) are available to refugees and regularized migrants. Morocco has also supported the concept of an African Migration and Development Observatory based Rabat, a project that the African Union formally approved in January 2019.¹⁶ Morocco is not only a country of emigration or transit, it is also a country of destination. The country has taken the pragmatic decision to regularize en masse during two regularization campaigns organized respectively in 2014 (23,056 applications approved) and 2016-2017 (more than 26,000 registered applications are still being processed). A law regulating domestic work was passed in October 2018.¹⁷ Morocco's emerging regional leadership on labour issues is part of the country's broader foreign affairs strategy of rejoining the African Union (in 2017) and seeking membership in the Economic Community of West African States (ECOWAS).

Algeria

With a population of 43 million and a percentage of the population aged 0-14 close to 30.5%,¹⁸ Algeria faces a difficult demographic problem – that of integrating its youth into the labour market. The large share (21%) of 15-24 year olds who are not in education, employment or training (NEET) confirms the difficulty of the task.¹⁹ According to data from the ONS (Office Nationale des Statistiques) for May 2019, the unemployment rate reached 11.4% of the active population, with significant disparities: the unemployment rate for men was 9.1%, but estimated at 20.4% for women and 27% for youth. The main employment sectors are construction: 17% of the total workforce; public administration: 16%; trade: 16%; health and social work: 15%. By contrast, if oil and gas account for 60% of Algeria's state budget and 94% of its total exports, even if the production of crude oil has

13 World Bank (2020) Morocco Economic Monitor, Fall 2020: From relief to recovery.

14 Start Up Square (2020) Covid-19 survey in Morocco, by Startup Square and La Startup Factory (CGEM-HCP).

15 Jaidi, L. and Martin, I. (2010) Comment faire avancer le statut avancé UE-Maroc ? Documents IE Med, 2ème édition, https://www.iemed.org/publicacions/DocslEMed_5.pdf

16 Décisions clés de la 32e session ordinaire de l'Assemblée de l'Union africaine (janvier 2019). <https://au.int/fr/pressreleases/20190211/key-decisions-32nd-ordinary-session-assembly-african-union-january-2019>

17 Loi no 19-12 du 10 août 2016 fixant les conditions de travail et d'emploi des travailleuses et travailleurs domestiques (Loi relative au travail domestique).

http://www.ilo.org/dyn/natlex/natlex4.detail?p_lang=fr&p_isn=105362&p_count=1&p_classification=22

18 World Bank – ILOSTAT -

<https://data.worldbank.org/indicator/SP.POP.0014.TO.ZS?locations=DZ>

19 World Bank – ILOSTAT -

<https://data.worldbank.org/indicator/SL.UEM.NEET.ZS?locations=DZ>

plummeted since 2007,²⁰ the energy sector is not very labour intensive given the stronger focus on production. Another structuring and concerning characteristics of the Algerian economy is a pervasive informal economy that has continued to grow in the aftermath of the 1990s economic crisis. Like other North African countries facing the same problem, this growth is due to the inability of the formal sector to create enough jobs for the massive influx of young new entrants onto the labour market. Souag notes that the share of the informal sector in the non-agricultural private sector in Algeria increased from 68.5% in 1997 to 72.8% in 2007, the number of informal workers in the non-agricultural private sector increasing from 1.2 to 3.3 million between 1997 and 2007, and up to 3.9 million by 2010.²¹ In this context, informal employment increased from 21.9% of total employment in 1997 to 46% of total employment in 2010, in spite of the 2008 Action Plan for Promoting Employment and Fighting Unemployment, which proved inefficient.

While the country remains poorly diversified economically and heavily dependent on oil and gas revenues, it is also exposed to three parallel migration dynamics: 1) poor socioeconomic situation and the lack of employment opportunities cause certain rural regions in Algeria to continually experience high levels of rural-to-urban migration; 2) regular and irregular emigrations to international destinations (89.4% to EU countries, according to JRC)²² raise concerns in terms of safety, protection, and brain drain; and 3) as a country of transit, due to its geographical situation, but also increasingly one of destination, Algeria is also confronted with social and economic issues resulting from the influx of migrants from sub-Saharan Africa and Libya in particular. Finally, from an institutional standpoint, Algeria supports international cooperation on migration and development and promotes a common regional approach on migration issues and management by participating in dialogue initiatives both in Africa and Mediterranean countries.

20 From 1,400 thousand barrels a day in 2007 to 800 in March 2020 and 300 in January 2021, affected by a lack of investments and the socioeconomic impact of the COVID-19 pandemic. See <https://www.bloomberg.com/news/articles/2021-02-08/an-oil-country-no-more-algeria-s-energy-exports-sink-rapidly>

21 Souag, A. (2018) "Labour Market Policies and Informality in Algeria" FEMISE Research Paper 42-05.

Tunisia

Like Morocco, Tunisia (11.7 million inhabitants in 2019) is on the path of demographic transition with an under-15 demographic segment that has fallen from 29% to 24% in just two decades. According to the INS (National Institute of Statistics) the active population in Tunisia stands at 4,2 million in December 2019 with respectively 71% of men and 29% of women. The unemployment rate recorded for the fourth quarter of 2019 was 15% with 12.1% for men and 21.7% for women. The distribution of the employed population by sector of activity was as follows : 52.1% in the services sector ; 18.5% in the manufacturing sector ; 15.6% in the non-manufacturing sector ; and 13.8% in the agriculture and fisheries sector.²³ Like other countries in the North African zone, gender and age are significant compounding variables, with unemployment rates of 36% for the 15-24 year old segment in 2019 (+6,5 percentage point compared to 2009).²⁴

According to INS indicators published in August 2020, the unemployment rate increased significantly in the second quarter to at least 18%. Over the same period of time (June 2019 to June 2020), the unemployment rate for higher education graduates rose from 28% to 31.2%. The same survey shows that 2 million employees were not present at work in April 2020, which represents 60% of the total employed in a context of general containment between late March and early May 2020. The mechanical and electrical industries, hotels, restaurants, construction and public works recorded historically low attendance rates (between 5% and 10%). In contrast, other sectors such as agriculture and fisheries, banking and insurance, mining and energy – directly essential to economic survival and the functioning of food supply chains – recorded attendance rates of around 70-80%. Regarding wages in April, 47.8% of employees received their wages, compared to 34.4% who did not, and 13.1% who received only part of their wages.

In 2014, Tunisia signed a mobility partnership agreement with the EU and a number of EU member states (Belgium, Denmark, France, Germany, Italy, Poland, Portugal, Spain,

22 Urso, G., Sermi, F., Tarchi, D., Koopmans, J. and Duta, A. (2019) Migration Profile Algeria, Bongiaro, D. editor(s), Publications Office of the European Union, JRC, Ispra.

23 INS (2020) The impact of the Covid-19 pandemic on the Tunisian labour market – August 2020.

24 Idem.

Sweden, and the United Kingdom). Among other objectives, this partnership aims to improve the information available to qualified Tunisian citizens on employment, education and training opportunities offered in the EU, and also to facilitate the mutual recognition of professional and academic qualifications. In addition, it aims at a better integration of Tunisian nationals legally residing in the EU and migrants legally residing in Tunisia, and the mobilization of Tunisian communities abroad for the development of Tunisia. In recent years, a relatively modest emigration of Tunisian nationals has been accompanied by irregular migration from sub-Saharan Africa and other North African countries (Libya, Algeria, Morocco) and the Middle East (Syrian asylum-seekers and refugees), partly because of the lack of regular migration arrangements.²⁵ Due to its geographical location, Tunisia has indeed become an important route for irregular migration to Europe.

Box 2: Tunisia's institutional efforts towards better migration governance

The recent creation of the National Migration Observatory illustrates Tunisia's willingness to address the issue of migration in a comprehensive manner. IOM supports not only the Observatory, but also the Office des Tunisiens à l'étranger (OTE) and the Agence nationale de l'emploi et du travail indépendant (ANETI). In 2016, with ILO support, the General Union of Tunisian Workers (UGTT) adopted an action plan on the protection of migrant workers in Tunisia - particularly in Tunis, Sousse, Sfax and Medenine. The Stratégie nationale sur les migrations (SNM) was presented in July 2017 by the Ministry of Social Affairs in collaboration with ILO, IOM and other international partners. This strategy aims to: improve migration governance; defend the rights and interests of Tunisian migrants and strengthen their ties to Tunisia; enhance the contribution of migration to socioeconomic development at the local, regional, and national levels; promote regular migration of Tunisians and prevent irregular migration; and protect the rights of asylum seekers and foreign migrants. Similarly, in August 2017, Tunisia began the process of developing the National Employment Strategy (NES), which proposes an integrated approach to create jobs and mobilize all actors involved in the labour market.

Egypt

Egypt has the largest population in the region, at 100.4 million, with approximately 34% young people below 15.²⁶ The demographic factor plays an essential role in the socioeconomic, employment and migration dynamics: from 2010 to 2015, the average annual population growth rate was estimated at 2.2% and the fertility rate at 3.4 children per woman.²⁷ Youth account for nearly 80% of the unemployed. Rapid population growth poses a significant challenge to the country's sustainable development. The lack of decent work opportunities has forced some workers to accept precarious and poorly paid work, and others to leave their country in search of better opportunities abroad. As in the region as a whole, far fewer women than men participate in the labour force (23% versus 80%).

According to the World Bank, a series of positive and recent macroeconomic and structural reforms had succeeded in stabilizing the economy with improving fiscal and external accounts. However, *'the adverse repercussions of the pandemic have since undermined this recent progress, shedding light on longstanding challenges [such as]: sluggish private sector activity and job-creation, especially in the formal sector, underperforming non-oil exports and Foreign Direct Investment (FDI), elevated government debt-to-GDP ratio (despite its significant reduction in recent years), below-potential revenue mobilization, and an unfavorable budget structure, with limited allocations to key sectors, such as health and education.'*²⁸ Given the uncertainties around vaccinations and possible new epidemic waves in the region, key economic sectors (oil and gas extractives, tourism, manufacturing, as well as the Suez Canal) continue to be massively impacted by international travel bans, a low and unpredictable demand, and disruptions to national and international supply chains and trade.

During the past decade, Egypt has also received the largest number of migrants among the five countries and now has the largest number of migrants in absolute figures and relative to its population (slightly less than 1%,

25 Awad, I. and Selim, H. (2017). Labour Migration Governance in Times of Political Transition: A Comparative Analysis of Egypt and Tunisia, in Migration and Development, vol 6, 2017, issue 1.

26 World Bank – ILOSTAT – <https://data.worldbank.org/indicator/SL.UEM.TOTL.MA.ZS?locations=EG&view=chart>

27 Document d'action du Fonds fiduciaire d'urgence de l'Union européenne, Égypte 2017

https://ec.europa.eu/europeaid/sites/devco/files/action_document_egypt_action_fiche_20170523_en.pdf

28 World Bank (2021) Egypt's Economic Update, April 2021 - <https://thedocs.worldbank.org/en/doc/9dbe40280b581a94ff950a11cab42fb3-0280012021/original/4-mpo-sm21-egypt-egy-kcm2.pdf>

including refugees): the country has become a destination for thousands of Arab and African immigrants and a major host of hundreds of thousands of Palestinians, Sudanese, and Syrian refugees since 2011. Egypt is also a transit country in migrant routes used by sub-Saharan Africans crossing the Mediterranean toward Europe, which has strengthened its political dialogue with the EU. In addition, Egypt is also an emigration country, as highlighted by Awad: *'In the last five decades, tens of millions of Egyptian migrant workers left for employment abroad for periods averaging six years and returned to their country. (...) Europe became a minor destination for Egyptian migrant workers in the last 30 years. Egyptian migration to North America and Australia was of the settlement type.'*²⁹ In this regard, Egyptian migrant workers contribute to regional labour these markets: 1) Jordan, with 126,000 Egyptian migrant workers and 636,000 (other) Egyptian migrants; 2) Gulf Cooperation Council (GCC) countries – mainly Saudi Arabia, the United Arab Emirates, and Kuwait.³⁰

Libya

With a few months to go before the presidential election, scheduled for December 2021, Libya is beginning to give signs of renewal and hope to its 6.8 million inhabitants. A series of studies conducted by IOM and the ILO point to three main trends affecting the country's labour market: *'a bloated public sector (still employing 70% of salaried employees), an anaemic private sector, and a poorly planned education system.'*³¹ These trends have contributed to a deteriorating business environment, skills mismatch, and the exponential development of informality.³² The existing data must of course be taken with caution, due to the lack of political stability since the fall of Gaddafi in 2011, as highlighted by the JRC report, which recalls that in 2017 the country was ranked 171st out of 180 in terms of perception of the democratization process.³³ With these caveats in mind, we note a contrasting unemployment rate between youth (49% for

15-24), women (24%), while standing at around 19% for the overall working population according to ILOSTAT.³⁴ The revival of the economy – mainly linked to hydrocarbons and to agriculture to a much lesser extent – could change things quickly if the country finds stability.

Libyan migration dynamics are marked by their great complexity, as noted in the analyses of the Mixed Migration Hub: *'Despite the tremendous focus placed on irregular migration through Libya to Europe, the situation is much more complicated with many migrants, refugees and asylum seekers choosing to remain in Libya while others with initial intentions to transit through becoming stranded in the country. (...) Worsening conditions, including exploitation and abuse in Libya has led or encouraged substantial number of migrants and refugees to cross to Italy from Libya.'*³⁵ Finally, while Libya is not signatory to the 1951 Geneva Convention, it is a signatory to the 1969 African Union Convention Governing Specific Aspects of Refugee Problems in Africa. Libya is a participating state of the Khartoum Process.

Box 3: The fast-changing complexity of Libyan migration networks, flows, and hubs

Analysing data from the Displacement Tracking Matrix (DTM) data set of the International Organization for Migration (IOM), Di Mario, Leone Sciabolazza and Molini (2020) showed in a World Bank paper that 'migration in Libya can be characterized as forced migration: conflict intensity is the main determinant of the decisions to relocate from one province to another. The analysis of migration flows across provinces indicates a dense network of connections; for each province, there is not a unique migration route from or to any other province, suggesting that individual-level characteristics play an important role in choice of migration route.'³⁶ Migrants in Libya mainly originate from Africa and to a lesser extent, the Middle East and West Asia. In January and February 2021, 575,874 migrants from over 41 nationalities were identified in all 100 Libyan municipalities during Round 35 of DTM data collection. More than two thirds of migrants are from neighbouring countries: Niger

29 Awad, I. (2021) On occasion of the pandemic: Reflections on Egyptian labour migration, International Migration, IOM, February 2021.

30 Awad, I. and Selim, H. (2017). Labour Migration Governance in Times of Political Transition: A Comparative Analysis of Egypt and Tunisia, in Migration and Development, vol 6, 2017, issue 1.

31 Borgnäs, E.; Cottone, L. and Teppert, T. (2021) Labour migration dynamics in Libya, in IOM (2021) Migration in West and North Africa and across the Mediterranean: Trends, Risks, Development and Governance. Chapter 24. Geneva.

32 Key Informant Interview with UNDP Regional – June 2021.

33 Urso, G., Sermi, F., Tarchi, D., Koopmans, J. and Duta, A., Migration Profile Libya, Bongiaro, D. editor(s), Publications Office of the European Union, Ispra, 2019.

34 World Bank – ILOSTAT –

<https://data.worldbank.org/indicator/SL.UEM.1524.ZS?locations=LY>

35 Mixed Migration Hub (2018) Libya Country Brief, funded by IOM and the USDOS. <http://www.mixedmigrationhub.org/wp-content/uploads/2018/05/Country-Profile-Libya.pdf>

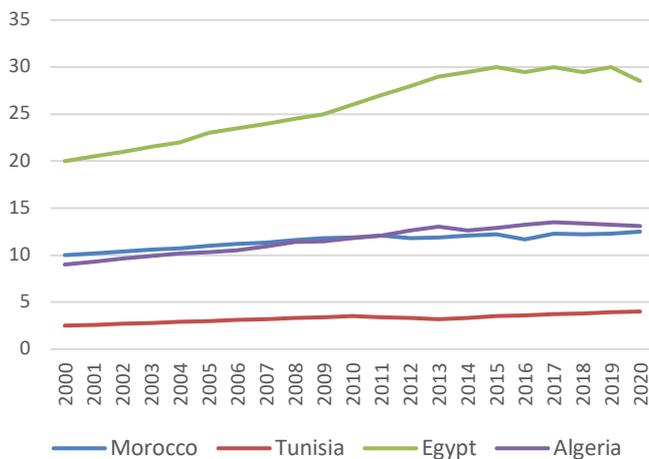
36 Di Maio, M., Leone Sciabolazza, V. & Molini, V. (2020). Migration in Libya: a spatial network analysis, Policy Research Working Paper Series, 9110, The World Bank.

(21%), Egypt (18%), Chad (15%) and Sudan (15%).³⁷ The majority of migrants in Libya are men constituting 90% of the estimated migrant population. Minors are estimated to make up 10% of the migrant population with 40% of them being unaccompanied, according to the Mixed Migration Hub and 2018 data.³⁸

Socioeconomic and migration dynamics in North Africa – comparative analysis

In order to better illustrate the similarities and differences between THAMM's North African partner countries, a comparison using ILOSTAT data allows us to identify some of the motives for labour migration not only within the region but even more so to the other side of the Mediterranean. The following graphs focus in particular on three key dimensions: the labour force participation rate (further disaggregated by gender), the sectoral shift from agriculture to services, and finally the vulnerable employment rate. The size of the labour force follows trends of population growth. Except for Egypt, North African countries exhibit a stable labour force with very little growth. This factor is mechanically correlated with demographic variables as well as the size and composition of migration flows. Labour force participation data reflects populations aging and youth migration patterns, only Tunisia shows a stable participation rate, suggesting low net migration.

Figure 1: Labour force (ILO estimate) in Morocco, Algeria, Tunisia, and Egypt (Source: World Bank, DataBank, 2000-2020)

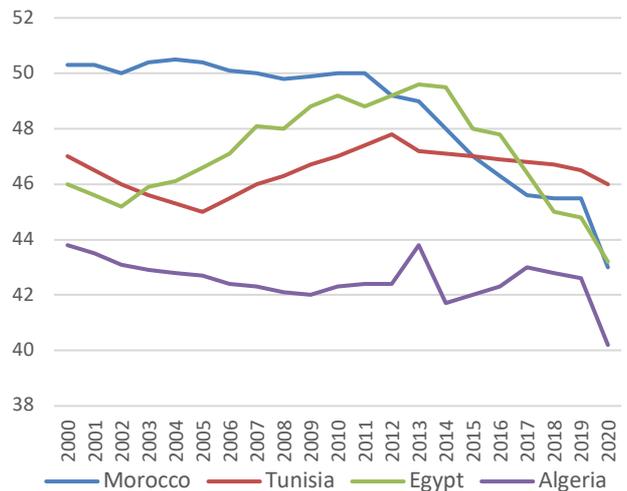


37 IOM – DTM (2021) Libya – Migrant Report 35 (January–February 2021) - <https://dtm.iom.int/reports/libya-%E2%80%94-migrant-report-35-january%E2%80%94february-2021>

38 Mixed Migration Hub (2018) Libya Country Brief, funded by IOM and the USDOS. <http://www.mixedmigrationhub.org/wp-content/uploads/2018/05/Country-Profile-Libya.pdf>

The labour force participation rate is a ‘measure of the proportion of a country’s working-age population that engages actively in the labour market, either by working or looking for work’.³⁹ This measure is generally useful to provide an indication of the size of the supply of labour available to engage in the production of goods and services, relative to the population at working age (15 to 64). It is an excellent indicator for assessing aging populations as well as youth migration patterns, particularly in North African countries. As the chart below shows, significant decreases are observed in countries with higher migration rates-Morocco, Algeria, and Egypt in particular. Libya has not been included, given the uncertainties in the available data.

Figure 2: Labour force participation rate (ILO estimate) in Morocco, Tunisia, Egypt, and Algeria (Source: World Bank, DataBank, 2000-2020)



The distribution of the labour force⁴⁰ by gender provides a good profile of the distribution of the labour force in each North African country. It is also a good sociocultural indicator: estimates of female labour force participation and employment are generally lower than those of men, reflecting social, legal, and cultural trends and norms. Although Algeria has seen a large improvement in women's labour force participation, it remains quite low, reflecting both current trends (pre-COVID-19) and the persistence of a highly gendered society. On the other hand, Tunisia has steadily increased the number of women in its labour force.

39 ILO – ILOSTAT Glossary (2016) <https://ilostat.ilo.org/resources/concepts-and-definitions/glossary/>

40 Formerly known as the economically active population.

Figure 3: Female labour force participation rate (ILO estimate) in Morocco, Algeria, Tunisia, and Egypt (Source: World Bank, DataBank 2000-2020)

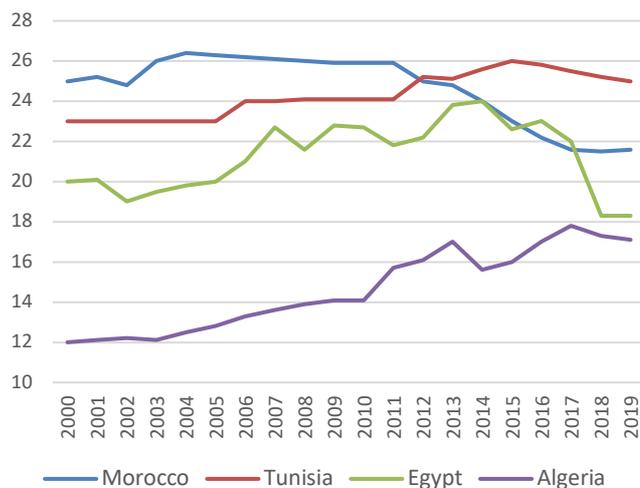
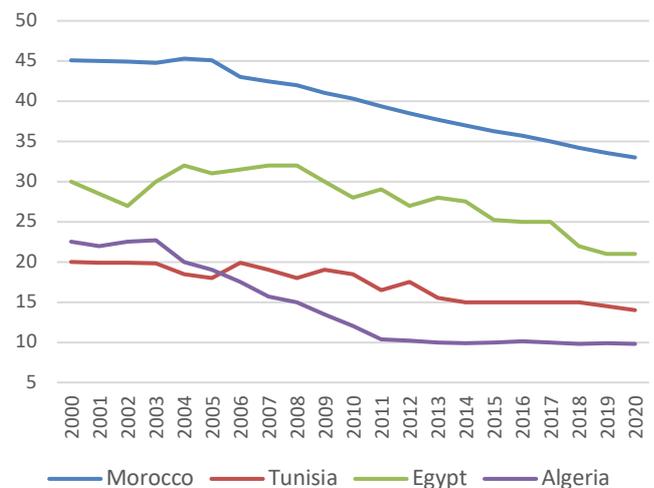


Figure 4: Employment in agriculture in Morocco, Algeria, Tunisia, and Egypt (Source: World Bank, DataBank 2000-2020)



Sectoral information allows to identify shifts in employment and stages of development: from agriculture to more labour intensive industry sectors (construction) and informal services sector (particularly towards its low productivity segments). It also reflects a major trend of most developing countries, in particular in Africa: the rapid and sprawling urbanisation phenomenon, guided by internal rural-to-urban migration, forced internal displacement, and the conversion of land into urban built-up areas. The chart below shows that employment in the agricultural sector has been steadily decreasing between 2000 and 2020: from 45% to 33% in Morocco, from 23% to 10% in Algeria, from 20% to 14% in Tunisia, and finally from 30% to 21% in Egypt. World Bank data confirm the economic shift towards manufacturing sector, in particular in Morocco and Tunisia. Interestingly, female labour force participation seems to have mostly shifted from agriculture directly to the service sector, *‘but we are probably not talking about the same women here. There are no “communicating vessels” between sectors. Those who have lost their jobs in the agricultural sector are sometimes stuck on the outskirts of secondary urban areas, with no possibility of retraining.’*⁴¹

The differences in definitions and coverage across countries render comparisons between North African countries on the existing forms of *‘vulnerable employment’* somewhat challenging.⁴² However, trends and dynamics can be observed and confirm other data on employment and work conditions. Vulnerable employment is often an indication of a large rural and informal economy, with a high proportion of contributing family workers and own-account workers.⁴³ According to the World Bank, *‘they are the least likely to have formal work arrangements, are the least likely to have social protection and safety nets to guard against economic shocks, and often are incapable of generating sufficient savings to offset these shocks.’*⁴⁴ The parallelism – with the exception of Algeria – between the curves describing the proportion of employees in the agricultural sector and the employment vulnerability curves is explained by the close correlation between the two phenomena: vulnerability remains highest in the agricultural sector, affecting between 60 and 90% of workers in North African, Asian, and Sub-Saharan African countries. At the same time, women are more likely to have lower quality jobs and lower wages than men.

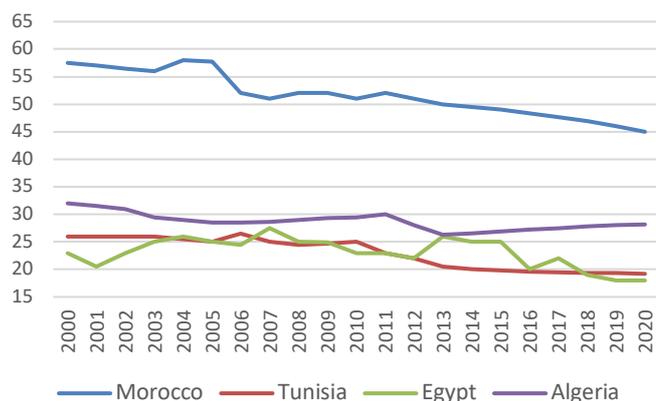
41 Key Informant Interview with UNDP, June 2021.

42 World Bank – ILOSTAT – <https://data.worldbank.org/indicator/SL.EMP.VULN.FE.ZS?end=2019&locations=MA-TN-EG-DZ&start=2010>

43 Gammarano, R. (2018) Paid employment vs. Vulnerable employment - A brief study of employment patterns by status in employment – ILOSTAT, Spotlight on work statistics n°3, June 2018. ILO Geneva. https://ilo.org/wcmsp5/groups/public/---dgreports/---stat/documents/publication/wcms_631497.pdf

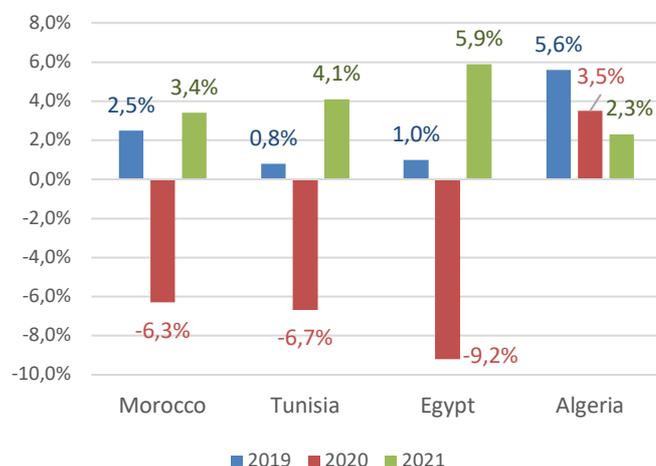
44 World Bank – Metadata Glossary - <https://databank.worldbank.org/metadataglossary/world-development-indicators/series/SL.EMP.VULN.ZS>. Indicators of vulnerable employment include: lack of employment contracts especially of durable employment, lack of social security, lack of annual leave, lack of weekly rest, low wages/income, no training, no career advancement. Vulnerable employment includes employment in the informal sector and informal employment in the modern sector.

Figure 5: Vulnerable employment rate (ILO estimate) in Morocco, Algeria, Tunisia, and Egypt (Source: World Bank, DataBank 2000-2020)



According to the World Bank, the socio-economic situation after seven months of pandemic in this region was marked by a global recession, affecting all countries in the area except Egypt with +5.6% growth in 2019, +3.5% in 2020 and a forecast of +2.3% in 2021. All other countries are struggling: Algeria (+0.8%, -6.7%, +4.1%), Morocco (+2.5%, -6.3%, +3.4%) and Tunisia (+1%, -9.2%, +5.9%). Libya is mentioned by the World Bank with great caution due to the uncertainties surrounding the available data (+1%, -40.9%, -3.6%).⁴⁵

Figure 6: Growth in real GDP in Morocco, Algeria, Tunisia, and Egypt (2019-2021) - WB estimates 2021.



The crisis has particularly highlighted the lack of diversification and mobility of many households, which have been deprived of a solution to the ongoing recession

45 Arezki, R., Moreno-Dodson, B., Yuting Fan, R. Gansey, R., Nguyen, H., Nguyen, M.C., Mottaghi, L., Tsakas, C., and Wood, C.A. (2020) Commercer ensemble : vers une relance de l'intégration de la région Moyen-Orient et Afrique du Nord à l'ère post-COVID. Bulletin d'information économique de la région MENA (Octobre), Washington, The World Bank Group. <https://openknowledge.worldbank.org/bitstream/handle/10986/34516/211639FR.pdf>

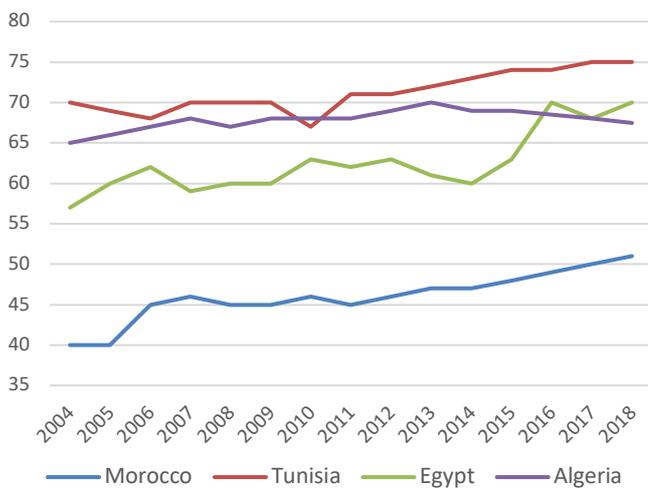
and have fallen into deep poverty: in Tunisia, 59% of workers who were deprived of jobs during the lockdown did not receive a salary, 30% kept their salary, and 10% received only part of it. In Morocco, 44% of the poorest households reported receiving no income during the lockdown, a proportion that rises to 10% among the richest households. At the end of 2020, according to Pierre Vermeren, historian and expert on social and economic issues in North Africa, 'the situation was unprecedented for decades: it is actually worrying not only for societies - because unemployment is soaring everywhere, and bankruptcies are multiplying: 40% of artisans have already gone bankrupt in Tunisia, and 35% of small and medium-sized businesses are threatened - but also for macroeconomic and monetary stability, because these countries are already heavily indebted in the crisis'.⁴⁶

The informal sector usually acts as a buffer against negative shocks, temporarily absorbing labor pushed out of the formal sector. As is often the case with the pandemic, however, the results defied expected patterns. Let's look first at the situation before the pandemic, assessed - in the chart below - using payroll employment data to measure the size of the informal sector and the potential improvement in working conditions. The data suggest substantial improvements in Egypt. Morocco has seen the share of its labor force engaged in the formal sector increase by 13 percentage points, although the figure remains low. However, in the context of the COVID-19 crisis, policies of social distancing, containment, and confinement have reinforced the vulnerabilities of the informal sector due to the nature of most informal sector jobs, where remote work is not an option. Informal workers have been forced to choose between complying with health distancing measures or maintaining their livelihoods. In total, 89 percent of informal workers in the MENA region are at risk of losing their jobs and income and have no social protection, according to an Oxfam report.⁴⁷

46 Vermeren, P. (2021). Le Maghreb assiégé par la crise du coronavirus. Hérodote, 1(1), 165-179.

47 Uzelac, A. (2020) The real common interest: The converging EU and North African migration agendas – where do people's interests come in? Oxfam International.

Figure 7: Formality and informality through Wage salaried workers



Taking into account that the data presented in this subsection were collected before the outbreak of the COVID-19 pandemic (March 2020), which is an aggravating factor for *all* the social and economic indicators concerned, several tentative conclusions can be drawn:

- 1) The indicators of the five countries concerned are marked by very high unemployment and a lack of socio-economic prospects in the short or medium

term;

- 2) Women and young people are particularly exposed in each of the five countries;
- 3) As both countries of origin and transit for migration to Europe, the North African countries have an opportunity to dialogue with the countries of the European Union – themselves in demand for skilled and low-skilled labour in many sectors – to foster a mutually beneficial approach to mobility.

As pointed out by the economist Mehdi Lahlou, about Morocco and Algeria specifically: North African countries *‘face a double challenge of the same nature which consists in preserving their respective interests at home and in relation to the countries of sub-Saharan Africa and the European Union, while acknowledging that the problems posed by irregular migration – which will worsen in the coming years – are solved in the countries of departure.’*⁴⁸ A renewed dialogue, of which the COVID-19 pandemic has underlined the urgency, can be usefully initiated during the exchanges within THAMM.



Picture 2: Credit FORMENA

48 Lahlou, M. (2018) Morocco and Algeria in European migration policies, ECDPM Great Insights magazine, Autumn 2018 (volume 7, issue 4).

<https://ecdpm.org/great-insights/north-africa-hope-in-troubled-times/morocco-algeria-european-migration-policies/>

LABOUR MIGRATION DYNAMICS FROM NORTH AFRICA

To understand the dynamics of mobility – and in particular all the issues related to labour migration – between North Africa and the European Union, it is essential to take three temporal components into account:

- On one hand, the long history of colonial rule, liberation struggles, and privileged bilateral relations (in particular with France for Morocco, Algeria and Tunisia; with Libya for Italy). Beyond purely economic or commercial exchanges, this long period of time is notably at the origin of university exchange programmes, collaboration in technical training, as well as more recent agreements for the employment of Moroccan or Tunisian seasonal workers, particularly in Spain or Italy.
- On the other, the shorter time frame and contemporary global dynamics of mobility, strongly influenced by the "Arab Spring" which led to social reforms in Morocco, prolonged demonstrations in Algeria and the fall of the governments in place in Tunisia, Libya and Egypt; but also by migration from sub-Saharan countries, the war in Syria, which have profoundly changed the composition, routes and volume of migration flows to Europe. In the last twenty years, countries on both sides of the Mediterranean have set up numerous programmes and interventions to better control, manage and analyze *mixed* migration flows from North Africa.
- Finally, the COVID-19 pandemic and its consequences on the world's economies have played an interrupting and accelerating role, with disastrous effects on employment, certain sectors of the economy, and the most vulnerable individuals (women, informal workers, economic migrants, etc.), while at the same time confronting political decision-makers and socio-economic actors with the immediate and longer-term need for structural reforms.

Leaving Libya aside,⁴⁹ this section considers the long and recent migration history between EU countries and Morocco, Algeria, Tunisia, and Egypt because of the volumes involved in terms of stocks and flows, as well as in absolute and relative terms to the population of each of the four countries. This initial historical perspective will be complemented by a typological overview of the three main forms of labour migration from North Africa to Europe: seasonal migrants, international students, and highly skilled professionals. The next section will go into more detail on the lessons learned from the current pandemic: social, societal, economic and political lessons, of which labour migration is certainly an excellent prism for reading.

Understanding historical dynamics: Morocco, Algeria, Tunisia, and Egypt

North Africa and Europe are linked by history and geography. How do these two regions relate to each other? How has their relationship evolved in the past and how to foster their cooperation? This subsection considers the long history and often bilateral relations, in order to recall that the dynamics of economic migration are by no means a new phenomenon. The complex colonial history and socioeconomic relationships between France, on one hand, and Morocco, Algeria, and Tunisia, on the other, is only a recent episode of centuries of mobility across the Mediterranean. Furthermore, Morocco, Algeria and Tunisia are generally presented – from a European perspective – as a homogeneous block and the historical and national differences between them not taken into consideration. Finally, the political perspective and interests of the Maghreb countries with respect to migration are largely ignored.⁵⁰ Natter's historical analysis distinguishes three main phases.⁵¹

49 For two reasons: 1) Libyans do not migrate much to Europe. Libya is a country of destination. Egyptians do, but Europe is not their main destination; 2) most data are inaccurate or outdated. Anecdotal evidence and interviews, however, fuel specific analyses on Libya.

50 Natter, K. (2016). *Au-delà de pays d'origine : Schémas migratoires en Algérie, au Maroc et en Tunisie* ; Friedrich Ebert Stiftung. And Natter, K.

(2014). *Fifty years of Maghreb Emigration : how States Shaped Algerian, Moroccan and Tunisian Emigration*, Oxford, UK: International Migration Institute, University of Oxford.

51 Idem. The precise distribution of the three phases also varies by country of destination, as data are not available for all periods in all countries. For example, the period for France is from 1964 to 2008, for Germany from

- **1964-1973, Recruitment of foreign workers and promotion of emigration.** During the 1960s and especially in the early 1970s, there was a demand-driven increase in emigration from Morocco, Algeria and Tunisia. Young men with low qualifications in particular migrated as workers to Northern and Western Europe (France, Germany, Belgium, the Netherlands);
- **1974-1995, Consolidation of migrant communities in Europe.** From 1973 to the mid-1990s, emigration from Algeria decreased sharply, while emigration from Morocco and Tunisia remained relatively stable. At the same time, migrant communities were consolidating in Europe through family reunification and naturalization.
- **1995 to the present day, Multiplication of migratory patterns.** Since the mid-1990s, emigration from Morocco has been increasing rapidly especially to Spain and Italy, while there has been only a moderate increase in emigration from Tunisia and Algeria. At the same time, the profile of migrants is changing: first, irregular migration is increasing considerably, and secondly, the level of education of migrants is on average significantly higher than in the past.

Although since the 1960s there has also been organized labour emigration to other European countries, such as Germany, Belgium, or the Netherlands, it was not until the 1980s that North African emigration shifted more to other destinations, above all to Spain and Italy. Until the 1980s, France was the main destination because of the historical links, colonial period, close economic and political cooperation that developed over the decades between France and the three countries. The figure below provides an overview of the geographic diversification of North African emigration over the past few decades, showing that France's share is declining, while those of Spain and Italy are sharply increasing.

Figure 8: Trend in total annual emigration from Algeria, Morocco and Tunisia to France, Spain, Italy and Germany (1964-2008)

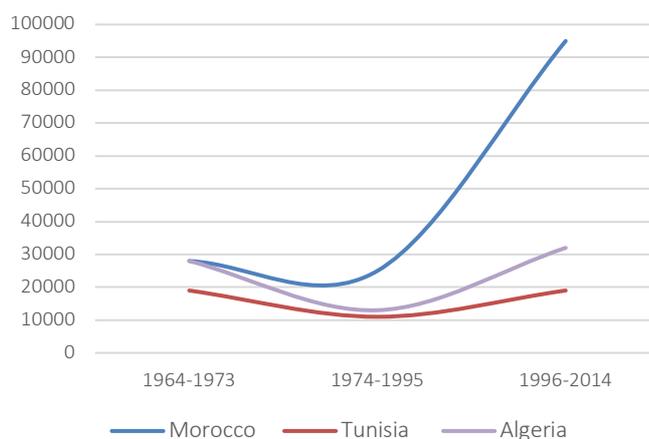


Figure 9: Evolution of total annual emigration from Algeria to France, Spain, Italy and Germany (1964-2014)

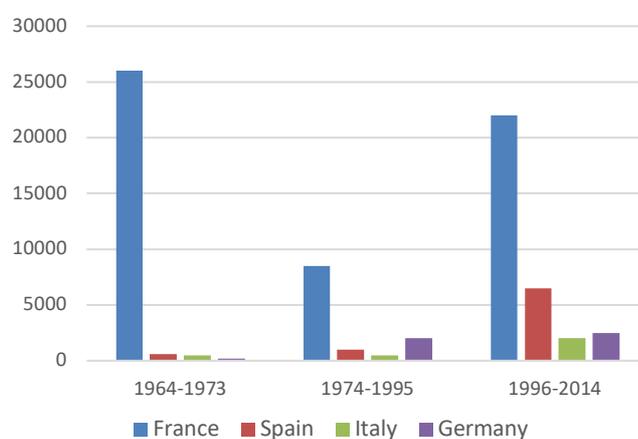
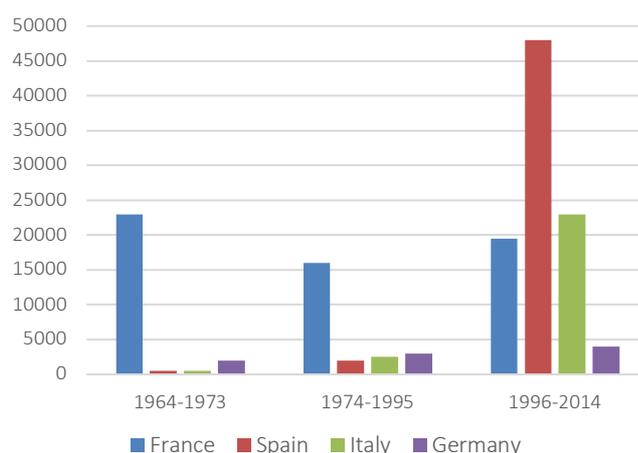


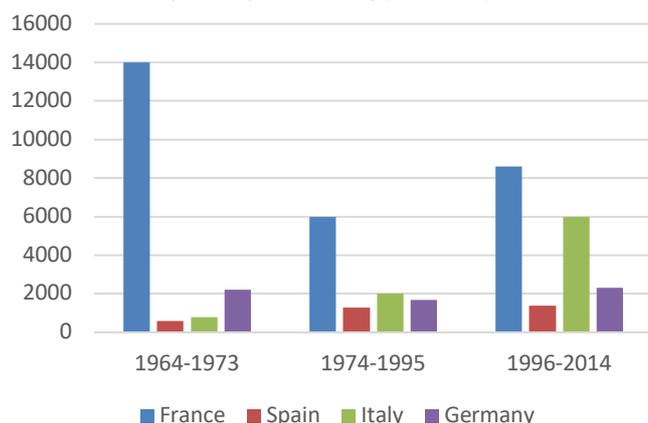
Figure 10: Evolution of total annual emigration from Morocco to France, Spain, Italy and Germany (1964-2014)



1965 to 2014, for Italy from 1980 to 2010 and for Spain from 1988 to 2011. Sources: for France, Spain, and Italy: DEMIG C2C Database (DEMIG 2015a); for Germany: 1965-2009, DEMIG C2C Database (DEMIG 2015a); for 2010-

2014, the Federal Office for Migration and Refugees / Bundesamt für Migration und Flüchtlinge (BAMF 2016: 172).

Figure 11: Evolution of total annual emigration from Tunisia to France, Spain, Italy and Germany (1964-2014)

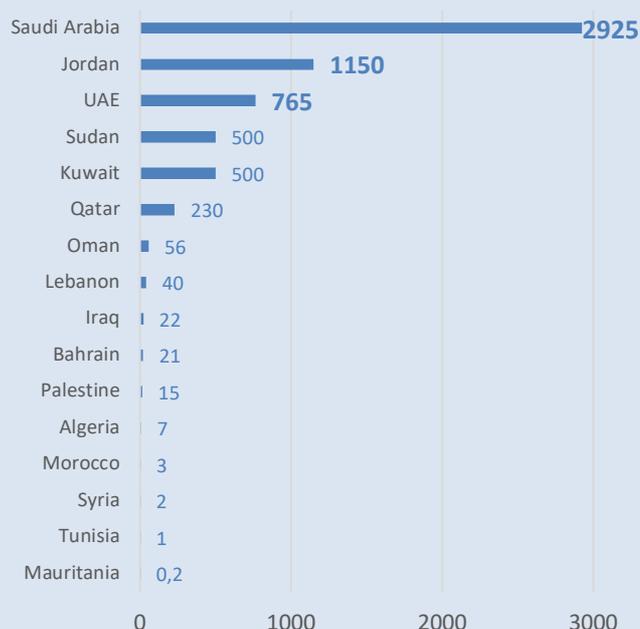


Sources for figures 9, 10, 11: DEMIG (2015) DEMIG C2C, V.1.2, Full Internal Edition, edited by University of Oxford International Migration Institute (IMI), Oxford, UK.

Box 4: Between soft power and a hard place: the case of Egypt

With an estimated population of over 100 million, Egypt is now the largest provider of migrant workers in the MENA region. According to an MPI note, emigration has become a real soft power instrument for Egypt at a time when ‘more than 6 million Egyptian emigrants lived in the MENA region as of 2016, primarily in Saudi Arabia, Jordan, and the United Arab Emirates (and) another 3 million Egyptian citizens and their descendants reside in Europe, North America, and Australia, where they have formed vibrant diaspora communities.’⁵²

Figure 12: Egyptian Migrants in the Middle East and North Africa (MENA), (Source: WB, 2016, in thousands)



52 Tsourapas, G. (2018) Egypt: Migration and Diaspora Politics in an Emerging Transit Country
53 Idem.

Historically, Egypt has been a country of emigration, most of which has occurred within the broader Arab region. Until the mid-1970s and the oil crisis, Egypt supplied Libya, Iraq, and the oil-producing Gulf Cooperation Council (GCC) with primarily low- and medium-skilled workers working in the public administration, education, health or agricultural sectors. From the mid-1970s onward, ‘international labour migration performs two main functions in the Egyptian economy. It is an external outlet for the growing Egyptian labour force, which reduces pressures on the domestic labour market. It also is a source of financial remittances in hard currencies.’ most Egyptian migrant workers headed to the Gulf region, notably Saudi Arabia, Kuwait, and Iraq. Recruitment of Egyptian workers in the GCC states operates under the Kafala system: in-country sponsor, hold ‘considerable power and control over workers.’⁵³

Contemporaneous perspective: Morocco, Algeria, and Tunisia

The wave of the ‘Arab Spring’ in 2010 and 2011 had different repercussions, while generating important institutional and socio-economic changes in each North African country. A decade later, some transitions have gone better in some countries than in others, but the socioeconomic problems remain as highlighted in the previous section. On the other side of the Mediterranean, the perception of a *migration crisis* in the media and in national opinion, fueled by the reality of tragedies in the Mediterranean Sea and populist and electoral narratives, have convinced EU countries to accelerate collaboration with North African countries in particular to manage mobility on both sides of the Mediterranean.

The harshest criticisms of the European Union’s stance – in particular to the European Border and Coast Guard standing corps, FRONTEX, and to an overall lack of policy coherence between member states – have been made in particular by civil society actors and NGOs, who stressed the extent to which the EU had gone ‘from a promoter of human rights in North Africa, to an actor that prioritizes self-interest over the needs and rights of people.’⁵⁴ Other NGOs interviewed for this research generally confirm the diagnosis: ‘On the one hand, countries such as Morocco, Algeria or Tunisia are not undertaking the necessary reforms, due to lack of resources, capacities or political will. These reforms are necessary, especially on the issues

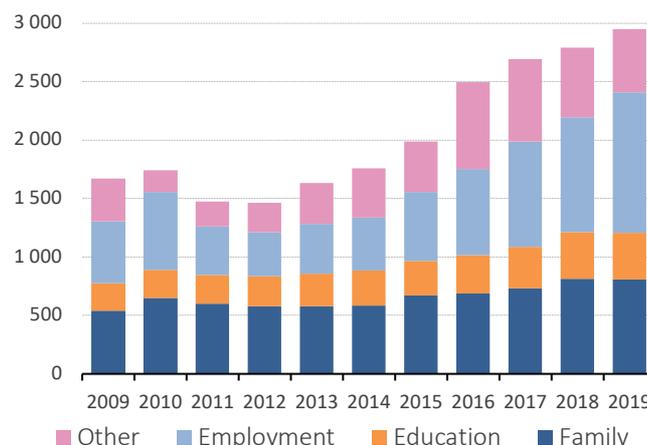
54 Uzelac, A. (2020) The real common interest: The converging EU and North African migration agendas – where do people’s interests come in? Oxfam International.

of asylum and protection. On the other hand, EU policies focus on rebordering, containment and policing, which creates no real incentive for real reforms and politicizes the debate.⁵⁵ From a conceptual and political standpoint, the process of rebordering, which has been at the center of EU internal politics for decades, is now at the heart of the issues, as Europe exports its borders - to North Africa, but also to sub-Saharan Africa, Turkey and Central Asia: 'rebordering pressures result from widening boundary gaps at the EU's external borders, exogenous shocks to cross-border transactions, growing community deficits of debordering, and their politicization.'⁵⁶

In this context, the dynamics of labor migration from North African countries to Europe should be observed. Recent trends show a real need for skilled and unskilled labor in EU countries. This strong demand, in a context of aging populations in many European countries and a lack of workers in construction or agriculture in particular, could outline the contours of an economically advantageous mobility for all actors, provided that it respects the rights and protection of migrants.

It should first be noted that the overall number of residence permits has increased continuously and globally over the decade 2009-2019, with two main reasons for this growth: employment and associated family reunification. In particular, globally, we note that work-related residence permits increased by 170% between 2014 and 2019. Going back to the ILO-ICLS definition of labor migration-which also includes international students-one can conclude that the total number of new residence permits issued to international migrants in 2019 for the 27 EU countries was 1.6 million (1.2+0.4), compared to only half in 2009 (0.55+0.25). However, if we break down this data by country of origin, we see that the increase is mainly due to Syria (+0.8 million over the period), Ukraine (+0.4 million) and India and China (both with +0.1 million), accounting for 85% of the total; in contrast, the number of new residence permits granted to North African countries is stable with a very slight increase (+0.08 million).

Figure 13: Number of new residence permits issued by type in EU 27 countries, 2009-2019 (by reason) - (Source: Eurostat, 2021)



If we consider the ranking of residence permits granted by European Union countries between 2014 and 2019 (in volume of valid, renewed and new permits), Morocco comes out on top with almost 2 million active permits. Algeria also makes the list with more than 0.7 million active permits over the same period. In relation to its population, Tunisia also has a proportionally comparable number of residence permits. This quick overview confirms the important role of North African workers in the European economy. The next section will seek to better qualify – in terms of skills, gender, and age in particular – the contours of this migration that contributes so significantly to the economic and social development of Europe, and in particular of France, Italy, Spain, and Germany.

Seasonal labour migration from North Africa to EU countries: a case study

Most of the current employment schemes in the EU target migrant workers within specific sectors, such as IT, construction, tourism or agriculture. Some of these sectors have been negatively affected by the COVID-19 pandemic, resulting in severe job losses. One essential sector strongly impacted by the crisis is agriculture. In the EU, agriculture is a main source of employment and income for less than 4% of the population, and this rate is

55 Key Informant Interview, International NGO, Tunis, June 2021.

56 See in particular:

1) Vicente Rufi, J., Richard, Y., Feliu, J. and Berzi, M. « Editorial: Peripheral borders, soft and hard re-bordering in Europe », Belgeo.

2) Bélanger, M., & Schimmelfennig, F. (2021). Politicization and Rebordering in EU Enlargement: Membership Discourses in European Parliaments. *Journal of European Public Policy*.

3) Eilstrup-Sangiovanni, M. (2021). Re-bordering Europe? Collective Action Barriers to 'Fortress Europe'. *Journal of European Public Policy*.

4) Lutz, P., & Karstens, F. (2021). External borders and internal freedoms: How the refugee crisis shaped the bordering preferences of European citizens. *Journal of European Public Policy*.

falling. This is partly due to the arduous nature of agricultural occupations and the fact that they generate less income than other activities. The recruitment of local and young labour is complicated in agricultural and rural areas, especially in remote areas, which generally suffer from a poorer quality of services and lower attractiveness. In addition, the agricultural production cycle is characterised by high variability and unpredictability due to alternating seasonal cycles, weather conditions and variations in food demand. This creates the need for a versatile, temporary and flexible workforce: *"Foreign seasonal workers are present in the most intensive sectors: as soon as an agricultural area specialises and industrialises, in short intensifies its production, effective channels for recruiting non-native labour are set up: the only labour force likely to accept the proposed pay and working conditions."*⁵⁷

Mobility restrictions cut off the usual seasonal inflows of workers from third-countries, disrupting harvests in the spring of 2020 and curbing the sector's productivity (particularly in countries such as Italy and Spain where they play a key role). Reacting to this situation, the European Parliament adopted a resolution on the protection of seasonal workers on 19 June 2020, calling on the Commission and Member States to ensure proper implementation of the relevant EU legislation⁵⁸ and issuance of new specific and long-term solutions. The resolution acknowledged that cross-border and seasonal workers had been particularly hit by the crisis and measures taken to contain the spread of the disease – many of them being *'stuck in the country of employment without income, protection, or transport (...) and sometimes even without shelter or access to healthcare and food'*.⁵⁹

In the agricultural and tourist year from April 2018 to March 2019, 1,050,000 people were hired on seasonal contracts in France. Over this period, the agricultural sector alone accounted for 270,000 seasonal workers, which represents a third of all its employees over the period.⁶⁰ France receives around 16,000 foreign seasonal workers each year, of which almost 50% come from Morocco (7,000 people, of which around two-thirds are recurring) and Tunisia (1,000) on the basis of labour agreements allowing seasonal workers to be brought in under a simplified procedure. On average, declared seasonal migrants from Morocco and Tunisia working in the agricultural sector in France thus represent 3% of the declared seasonal workforce. This is certainly an underestimated figure, as it only takes into account declared contracts. The immigrant workforce from Morocco and Tunisia, particularly in intensive arboriculture (fruit picking) and greenhouse market gardening, is actually much larger if undeclared workers are taken into account. In some French regions, no production would be possible without their contribution: horticulture in Bouches-du-Rhône, asparagus in Gard and Landes, strawberries in Dordogne or Lot-et-Garonne, etc.

Spain and Italy present two types of seasonal worker profiles, circular and permanent. Spain is the world's top exporter of strawberries and 90% are produced in the province of Huelva (6000 hectares and about 300,000 tonnes a year between February to May). Strawberry farms are heavily reliant on the 50 000 seasonal workers, mainly foreign migrant workers, who come each year. Most legal foreign guest workers are eastern Europeans, followed by Moroccan and Latin Americans. Typical seasonal workers in Spain arrived with local temporary migration programmes and have been coming regularly for six or even eleven years, for a period of three to six months a year. The numerous Moroccan women employed in the strawberry fields are recruited in their

57 Decosse, F. and Hellio E. (2015) Migration circulaire ou canalisation utilitariste des mobilités? Les programmes de migration temporaire en agriculture intensive vus d'en bas, in Journée d'étude "La circulation et le retour à l'épreuve des contraintes migratoires?", Université Paris-Diderot, URMIS, Paris, 25 septembre 2015.

58 According to the European Parliament, 'migrant seasonal workers are covered by the Seasonal Workers Directive (Directive 2014/36/EU), which grants them equal treatment in terms of employment conditions, minimum working age, working conditions and occupational health and safety measures. For the first time, the directive provided a set of harmonised rules for the admission, residence and rights of third country seasonal workers. Seasonal workers have the right to equal treatment with nationals of the host country as regards terms of employment, such as the minimum

working age, working conditions (such as pay and dismissal, working hours, leave and holidays) and health and safety regulations. The right to equal treatment also applies to social security benefits linked to sickness, invalidity and old age, training and advice on seasonal work.'

([https://www.europarl.europa.eu/RegData/etudes/BRIE/2021/689347/EPR_S_BRI\(2021\)689347_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/BRIE/2021/689347/EPR_S_BRI(2021)689347_EN.pdf))

59

[https://www.europarl.europa.eu/RegData/etudes/BRIE/2021/689347/EPRS_BRI\(2021\)689347_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/BRIE/2021/689347/EPRS_BRI(2021)689347_EN.pdf)

60 https://dares.travail-emploi.gouv.fr/sites/default/files/pdf/dares_analyses_emploi_saisonnier_fr_ance_2018-2019.pdf

country of origin. They generally do not speak Spanish and are sometimes illiterate, which means they are entirely dependent on their employers. Most of the 7,000 Moroccan women who had managed to come to Huelva before Morocco closed its borders on 13 March 2020 found themselves in a dire situation at the end of the strawberry harvest season. Their contracts had expired in mid-June 2020 but their home country was keeping its borders closed having adopted conservative stance to limit the spread of the pandemic. They remained stranded in Spain for some weeks, with very little money, before the Spanish and Moroccan governments came to an agreement to repatriate them.⁶¹ In February 2020, the United Nations' Rapporteur on Extreme Poverty and Human Rights, Philip Alston, stated that some of these migrant workers lived in shantytowns *'with far worse conditions than a refugee camp, without running water, electricity or sanitation'*⁶².

In Italy, in Piana del Sele (provincia di Salerno), Moroccan or Tunisian seasonal workers are often in an irregular situation. They enter agricultural activities through personal networks or via an illegal intermediation system, the Caporalato. The Italian agricultural sector is said to have the particularity of capturing irregular seasonal workers who have entered illegally – with tourist visas or false contracts – but also seasonal and non-seasonal workers with permanent European permits, often from Spain. In Italy, for example, the figure of 370,000 migrant workers in agriculture (27% of the legal agricultural workforce) does not reflect the fact that the bulk of seasonal agricultural work is carried out by undocumented migrants or asylum-seekers. It is estimated that Italy's agricultural sector numbers between 400,000 and 500,000 migrant workers, around half of the total agricultural workforce, with a significant and growing proportion of Romanians, Albanians and North African workers.

According to the results of a joint research project by the Research Unit of Germany's Expert Council on Integration and Migration (SVR) and Migration Policy Institute Europe (MPIE), official figures do not reflect reality, as many

migrant seasonal workers go un-recorded. Likewise, according to the Milan Center for Food Law and Policy and the European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT), illegal work in agriculture is estimated to exceed 20% in Italy, Greece, and Spain. In Portugal and Bulgaria, the rate is said to be over 40%. In Southern Italy, although official statistics indicate that migrants account for about half of the labour force employed in agriculture, independent reports suggest that this figure could be as high as 80% if undeclared and irregular migrants were included.⁶³

Table 1: Number of first-time authorisations granted to Extra-EU workers for seasonal work (by sector and gender)

		Number of first-time authorisations granted to third country nationals for seasonal work	Percentage of first-time authorisations granted to third country nationals for seasonal work in agriculture	Disaggregation by gender (% of women in the Agriculture sector)
Spain	2017	5,752	98%	86%
	2018	13,789	99%	93%
	2019	11,368	95%	92%
Italy	2017	2,308	64%	11%
	2018	3,578	61%	9%
	2019	2,650	63%	9%

International students from North Africa

The demand for technical skills and qualifications – particularly in the engineering, new technology and service sectors and even more so in the healthcare sector – is constantly growing. This reality has accelerated and modified existing dynamics in tertiary and higher education, as well as in the migration of skilled workers from North Africa to Europe. In terms of education, the geographical and cultural proximity and the advantage of accessible French-language education make French universities an opportunity to plan a career abroad or to return to North Africa for many young Moroccans, Algerians and Tunisians. In contrast, Egyptians largely attend universities in Egypt and only migrate for their first job or postgraduate training to Europe (Italy, France, Germany), the UK or North America. The chart below shows the dynamics over the last decade, with a doubling

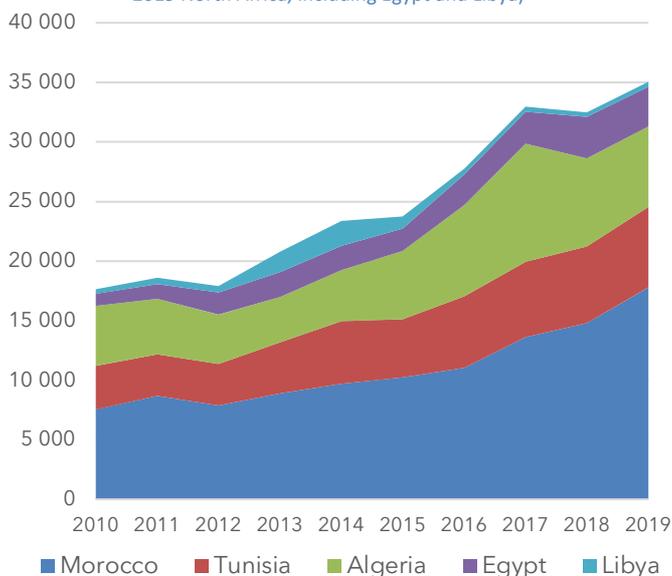
61 <https://www.worck.eu/2020/04/08/strawberry-fields-in-the-spanish-province-of-huelva-migrant-women-under-the-risk-of-covid-19/>

62 <https://www.ohchr.org/EN/NewsEvents/Pages/DisplayNews.aspx?NewsID=25524&LangID=E>

63 See in particular Borges, A. and Huet, N. (2020) Invisible workers: Underpaid, exploited and put at risk on Europe's farms. Euronews & Lighthouse Reports.

of the number of first permits issued for education reasons between 2010 (17,500) and 2019 (35,000). If we disaggregate these data by country of origin, we see that Morocco provides about 50% of the contingents, Algeria and Tunisia more than 20% each and Egypt a little more than 5%.

Figure 14: First permits issued for education reasons by citizenship (2010-2019 North Africa, including Egypt and Libya)



If we now consider the European destination countries for North African students, we see that France is by far the preferred country for Moroccan, Algerian and Tunisian students – due to their shared history and language. Tunisia was one of the most represented countries among foreign students in France with 12,390 students and 18.3% of foreign students enrolled in doctoral programmes in French universities in 2017. It is in 4th position after Morocco (11.7%), China (8.9%) and Algeria (8.1%), according to the French Ministry of Higher Education, Research and Innovation.

Table 2: Countries of origin of North African students in France (Source : MESRI-DGESIP 2017)

Academic year 2017	Students	percentage	International Rank
Morocco	38,002	12%	1
Algeria	26,116	8%	3
Tunisia	12,390	4%	4
Other African countries	69,257	21%	
TOTAL (World)	323,933		

The long-standing relationship between France and North African countries explains the virulence of the reaction sparked in November 2018 by the French government's strategy to attract new foreign students - *Welcome to France*. This strategy indiscriminately focused on: 1) improved visa and scholarship policy for foreign students, and 2) a significant increase in tuition for non-European students. On both sides of the Mediterranean, universities and academic centers immediately criticized the reform and some French universities even refused to apply it to African and North African students: *'This purely bureaucratic reform, taken from Paris, was misunderstood because it broke with a tradition of dialogue and partnership. Beyond the unfortunate political or diplomatic episode, the reaction shows the importance of educational and academic exchanges between France and the Maghreb countries.'*⁶⁴

Figure 15: First permits issued for education reasons to Moroccan students (annual duration) 2015-2019 – Eurostat 2021

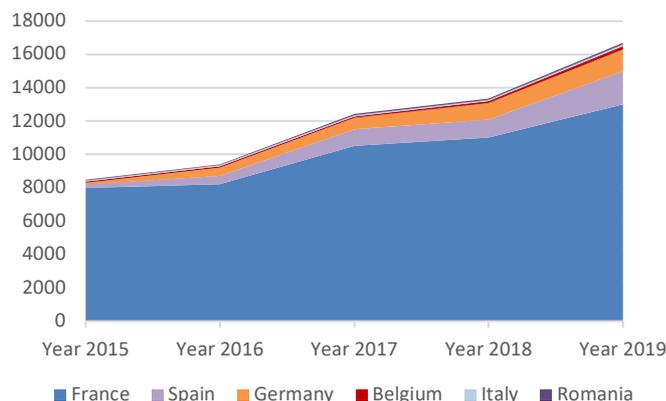
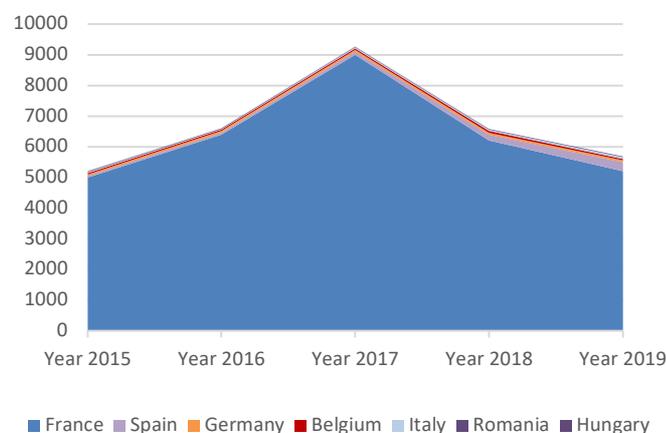


Figure 16: First permits issued for education reasons to Algerian students (annual duration) 2015-2019 – Eurostat 2021



64 Key Informant Interview, Ministère de l'Enseignement Supérieur, de la Recherche et de l'Innovation, Paris, May 2021.

Figure 17: First permits issued for education reasons to Tunisian students (annual duration) 2015-2019 – Eurostat 2021

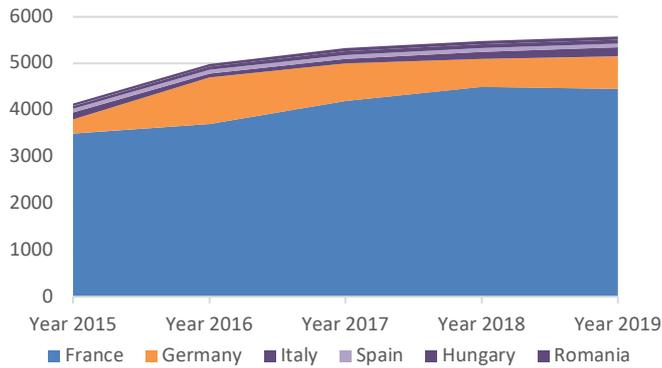


Figure 18: First permits issued for education reasons to Libyan students (annual duration) 2015-2019 – Eurostat 2021

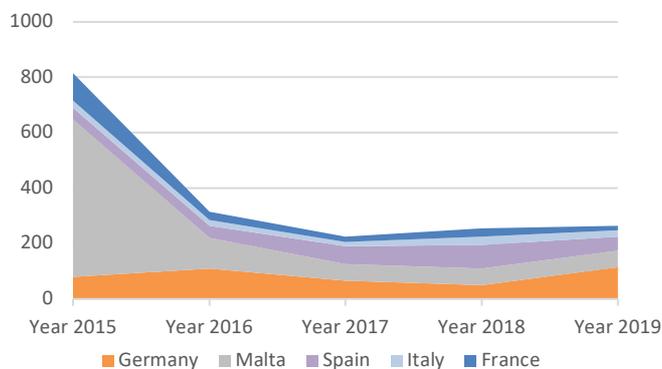
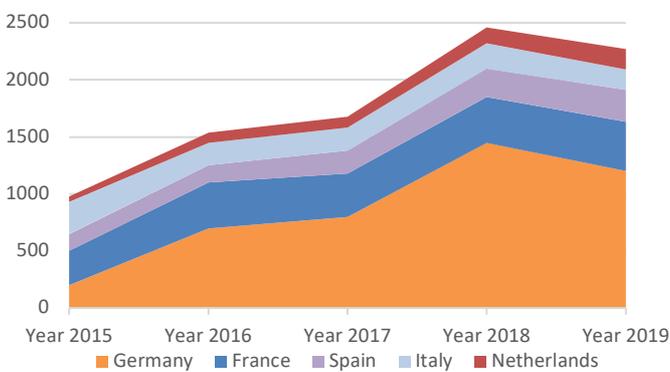


Figure 19: First permits issued for education reasons to Egyptian students (annual duration) 2015-2019 – Eurostat



it easier or more difficult to enter the market - unlike young Moroccans, Algerians or Egyptians – which contributes more to keeping them in the country. Finally, the very high proportion of highly qualified women who cannot enter the labour market (nearly 60%) is linked to socio-cultural obstacles, particularly in times of crisis or recession. For all the countries covered by this study, the difficulty of integrating the most highly qualified people runs the risk of a talent and skills drain; it is also an indicator of more structural issues in countries where informality and underemployment remain endemic.

Figure 20: Unemployment rate by education level and gender (Egypt - OECD 2020)

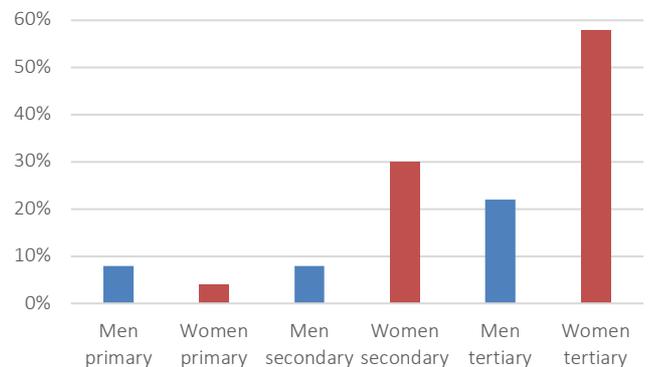
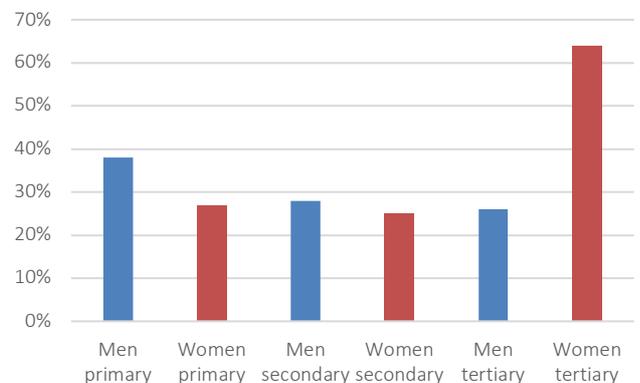


Figure 21: Unemployment rate by education level and gender (Tunisia - OECD 2020)



Finally, a quick look at the comparative youth unemployment rates in Egypt and Tunisia reveals important nuances that are due both to socio-cultural differences and to the local labour market situation. In both cases, the inability of highly skilled (tertiary) youth to enter the labour market is largely due to the lack of real opportunities for the type of skills they have to offer in a sluggish and largely informal market. In the Tunisian case, it is noted that highly qualified young people do not find

Highly skilled workers from North Africa

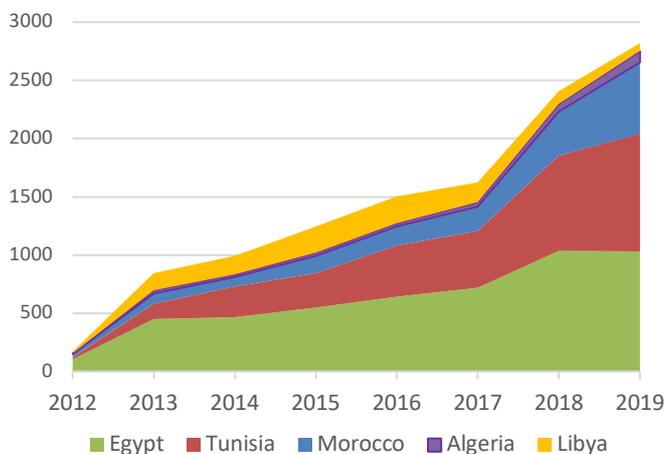
In the labour market, qualified or highly qualified North Africans ('advanced education') are often particularly exposed to unemployment: 30% for Morocco (2003), 29% for Tunisia (2017), and 22% for Egypt (2018) according to the World Bank and ILOSTAT.⁶⁵ The causes generally mentioned, beyond the difficult economic context, are

65 <https://data.worldbank.org/indicator/SL.UEM.ADVN.ZS?locations=MA-TN-EG-DZ>

often the same: 'skills mismatch and lack of opportunities', 'low salaries and absence of reward', 'lack of adequate opportunities', 'nepotism and lack of network'.⁶⁶ The socioeconomic situation and lack of professional perspectives are important push factors for international migration from North Africa. As highlighted by Almalki, 'with the opening of certain professions to immigrants, the countries of the South participate in the development of the countries of the North.'⁶⁷ These pull factor and subsequent trend are not new and has accelerated considerably in the last decade.

The *blue card* model, a European work permit approved by a 2009 directive and implemented very unevenly across the EU, has contributed to accelerating the phenomenon. As shown in the chart below, over the period 2012-2019, Eurostat figures confirm exponential curves for Egypt, Tunisia and Morocco in particular: in 2012, the European Union had granted respectively 105, 18 and 29 *blue cards* to highly qualified workers from each of these three countries; seven years later, these figures have increased respectively to 1033, 1010 and 609.

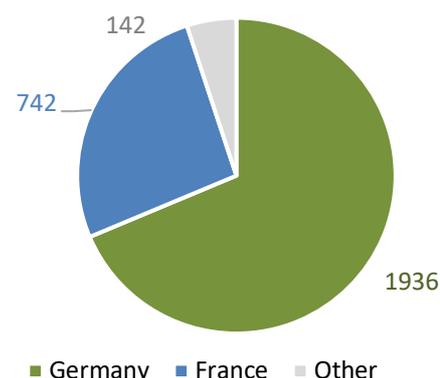
Figure 22: EU 27 blue cards for the "highly skilled" labour force



In 2019, it was Germany that led the EU countries in the number of blue visas granted to North African countries: for the five countries of origin considered in this study, Germany and France alone account for nearly 95% of the *blue cards* granted to highly skilled workers. The motivations behind these *blue visas* seem pragmatic from

a European perspective, as the president of the European Commission emphasized in 2007 when he pointed to: 1) the aging of the European population and its increased need for highly skilled workers; 2) the rights gap between EU citizens and legal immigrants. Moreover, one could argue that North African skilled workers legitimately wish to gain exposure to other contexts, which contributes to their experience and expertise.

Figure 23: EU 27 blue cards (by receiving country)



For the Moroccan international economic law professor Tajeddine El Husseini, the *blue card* paradigm 'is a new form of colonisation, of discrimination, and it will be very hard to find support for it among southern countries'.⁶⁸ In an analysis published in 2010, CARIM already identified a significant brain drain in Egypt, with harmful consequences in terms of social and economic development for the country and the region: 'Migrants to OECD countries are highly-educated professionals, mostly doctors, engineers, and teachers. Their distribution according to specialization reveals that 18.3% were in the medical sciences, 33.2% were engineers, 36.5% were in the social sciences, 8.0% in the basic sciences and 5.0% in agriculture. Egyptian permanent migrants have increased as a percentage of total migrants from 9.6% in 1983 to 38.0% in 2006. They increased at a higher rate (9.7%) than total migration (2.2%).'⁶⁹ Beine, Docquier and Rapoport⁷⁰ investigate how the negative and positive effects of highly skilled international migration balance out. However, the

66 Focus Group Discussion, Tunisian and Moroccan students – virtual discussion conducted in June 2021.

67 Almalki, R. (2011). Vous avez dit : immigration choisie ?. Cités, 2(2), 113-118.

68 El Housseini, T. interviewed by Apps, Peter (26 October 2007). "EU Blue Card Scheme could drain developing world". Reuters – 26 October 2007.

69 Nassar, H. (2010) 'Migration of Skills, the Egyptian Case', CARIM - Consortium for Applied Research on International Migration, EUI - Robert Schumann Center for Advanced Studies.

70 Beine, M., Docquier, F. and Rapoport, H., (2008). Brain Drain and Human Capital Formation in Developing Countries: Winners and Losers. The Economic Journal, 118(528), pp.631-652.

expression brain drain⁷¹ remains too often the most adequate to qualify the exodus of highly skilled North African professionals to Europe. In this regard, Ait-Larbi notes that the proportion of Highly Educated Algerians immigrating to OECD countries jumped from a rate of 5% in 1990 to 21% in 2010.⁷²

The case of the medical professions is undoubtedly the most publicized, especially at a time when societies seem to be unevenly affected by a global pandemic. In France, 220,000 physicians are currently practicing (of which a little more than 10% were trained abroad, nearly half of them in Morocco, Algeria or Tunisia), compared to 70,000 doctors in Morocco, Algeria, 25,000, and 15,000 in Tunisia. In relation to the population, France has 1 physician for 304 inhabitants; Morocco has 1 for 520, Algeria 1 for 1720, and Tunisia 1 for 780. While Morocco is not the worst off country, it has been singled out by the World Health Organization for serious health care shortcomings and its *'deep geographical and socio-economic inequalities'*.⁷³ According to Najib Akesbi, not only does Morocco not train enough doctors (1,900 per year as opposed to a stated goal of 3,300) but *'doctors are trained for export'*: low salaries, lack of equipment and infrastructure, etc., all the conditions are there for the exodus.⁷⁴ In Tunisia, public hospitals are usually overwhelmed and lack the necessary resources (protection, tests, resuscitation, respirators, medical equipment and medicines), which condemns the majority of people to stay at home. For example, in Tunisia, a patient from Covid-19, destined for resuscitation, must pay 25,000 dinars (8,200 euros) to be admitted to such a private service, which is the equivalent of 3.5 years of minimum wage.⁷⁵ With such an environment in mind, it goes without saying that the question of the mobility of the most qualified professionals is a crucial issue, with not only economic but also political and societal

consequences : nearly 15,000 Moroccan doctors work in France, according to official figures⁷⁶ with a considerable amount having graduated in their country of origin .⁷⁷

Table 3: Global Medical Brain Drain rate in North Africa (Source: Zehnati, 2017 and Ait-Larbi, 2021, with data from MSPRH, MSM, MST, CNOM, and INSEE)

Physicians' employment status	Morocco	Algeria	Tunisia
Born in North Africa and settled in France (INSEE, 2012)	14,847	6,230	3,846
Active in native country (National data)	48,184	19,770	13,640
Medical Brain Drain	24%	24%	22%

Box 5: Population aging, migration, and productivity - questioning the conventional age-dependency ratio

In a recent contribution, Marois et al. provide a multidimensional *'analysis of the degree to which negative economic consequences of population aging can be mitigated by changes in migration and labour-force participation'*. According to a set of alternative projections of future changes in labour-force participation, migration volumes, educational composition and speed of integration for EU member states, the authors show that even if *'demographic aging is unavoidable in Europe, the fears associated with the coming economic burden have been unduly exaggerated through the use of the simplistic and inappropriate conventional age-dependency ratio. There are plausible scenarios where feasible public policies could be effective in coping with the consequences of population aging. Depending on the policy options preferred and available – encouraging higher labour-force participation among the native population and/or education-selective migration together with high integration efforts – Europe could largely avoid the widely assumed negative impacts of aging and maintain a dynamic labour force based on high human capital.'*⁷⁸ This analysis does not contradict the traditional view that demographic aging calls for target labour migration policies (in particular from North African countries), which is detrimental and denounced by countries of origin. However, it also clearly identifies the challenges for future socio-economic development: 1) finding a balance between an increased labour-participation rate within the European Union and a mobility of skills with neighbouring countries

71 De la Croix, D., and F. Docquier. (2012). "Do brain drain and poverty result from coordination failures?" *Journal of Economic Growth* 17:1: 1–26; and Docquier, F., (2014). The brain drain from developing countries. IZA World of Labour : 'brain drain' is defined as "the international transfer of resources in the form of human capital and mainly applies to the migration of relatively highly educated individuals from developing to developed countries."

72 Ait-Larbi, Y. (2021) Health Without Care; A Reflexive Sociology of Human Capital Flight in Post- Colonial Algeria

73 WHO (2016) Stratégie de coopération OMS-MAROC 2017-2021. Organisation mondiale de la Santé. Bureau régional de la Méditerranée orientale.

74 Quote from the Moroccan economist Najib Akesbi in Verdier, M. (2020) 'Au Maghreb, des systèmes de santé exsangues' in La Croix du 8 avril 2020 -

<https://www.la-croix.com/Monde/Afrique/Au-Maghreb-systemes-sante-exsangues-2020-04-08-1201088418>

75 Saaïdia, O. (dir.), (2020) « Vivre au temps du coronavirus. Chroniques de confinement : regards de chercheurs depuis la Tunisie », IRMC/Éditions Nirvana.

76 INSEE (2012). Evolution et structure de la population, RP exploitations complémentaires. Institut National de la Statistique et des Etudes Economiques.

77 Zehnati, A., (2017). Medical brain drain from Maghreb to Northern countries : for a new social dialogue ?. The e-Journal of Economics & Complexity, Volume 2 (2016) Number 1 May 2017.

78 Marois, G., Bélanger, A. and Lutz, W. (2020) Population aging, migration, and productivity in Europe, PNAS - Proceedings of the National Academy of Sciences, USA. <http://www.pnas.org/content/117/14/7690>

and regions; 2) not transforming 'education-selective migration' into exclusionary measures towards other types of migrants or socio-economic profiles; 3) not contributing to a 'brain drain' phenomenon from North African countries, which would be contrary to short-term political and long-term socio-economic interests; and 4) developing resolute efforts for the integration of migrants - regardless of the attractiveness of the migratory profile.



Picture 3: Credit Egyptian Street – CAPMAS

LEARNING FROM THE COVID-19 CRISIS

Since March 2020, OECD countries, and EU countries in particular, have realised that certain skills and professions are particularly critical during a pandemic: doctors, nurses, care staff, logistics, teachers, etc. While not all of these occupations are filled by migrant workers, it is now recognised that circular migration patterns between EU countries (destination countries) and North African countries (sending countries) have helped – and are helping in particular today – to solve labour shortage problems in some key sectors of the economy. And this at a lower cost, without having to pay for education, training or long-term social integration. Finally, in return, countries of origin receive the skills of labour migrants and the investments of returning migrants. Such a *'triple win narrative'* between the migrant, the host country and the country of origin has however been challenged. As ILO points out, particularly since the outbreak of COVID-19, *'many migrants had to return home to ensure receipt of proper health coverage, and those who could still cross borders are at an increased risk, notably of insufficient safety and health at work. There have been numerous cases of exploiting migrant workers and not respecting their rights at work.'*⁷⁹ Questioning this narrative also provides an opportunity to critique the existing model and promote a more economically sustainable and socially just mobility paradigm.

Migrant workers contribution to the European COVID-19 response

The COVID-19 crisis has brought a new emphasis on the critical role of migrants in the global workforce. Migrant workers *'were key to our economies and societies before the pandemic and are likely to become even more essential in the recovery to sustain our weakened economies and exhausted societies'*.⁸⁰ According to a JRC analysis, in the EU, migrants (i.e. defined in this report as both non-EU born and mobile EU workers) account for the 13% of workers that are deemed 'essential' to keep the

EU economies running. In particular, the share of foreign-born workers constitutes up to a third of the total in essential low skilled professions, including cleaners and helpers, and labourers in mining and construction. According to the same report, despite natives making up the majority of key workers (which constitute approximately 31% of employed working-age individuals), non-EU born migrants and EU mobile citizens are essential in filling vital roles.⁸¹

Faced with a shortage of essential workers due to mobility restrictions, many EU Member States implemented measures to facilitate access to the labour market for third-country nationals already residing in their territory in order to address labour shortages in essential sectors, especially agriculture and healthcare. A few of them granted or extended the right to work in essential sectors to asylum seekers ; allowed seasonal workers to extend their residence status; facilitated changes in status (for example from student to work status); or introduced flexibilities to improve access to work in key sectors. Regularisation of third-country nationals who had been employed in certain key sectors was also permitted in a limited number of cases. Finally, as pointed out by the European Commission, *'low skilled workers from third-countries are especially over-represented in a number of key occupations that are vital in the fight against COVID-19, underscoring their often-neglected value within European economies.'*⁸²

The contribution of the migrant workforce to Europe's effort in keeping vital sections of the economy operational is heterogeneous across Member States, mainly reflecting existing differences in the share of migrant workers over the total workforce. Moreover, as shown in the Figure below, in most Member States, Extra-EU migrants are overrepresented among the key workers, this is especially true for low skilled Extra-EU migrants (e.g. personal care workers in health service, drivers,

79 https://www.ilo.org/budapest/whats-new/WCMS_757579/lang-en/index.htm

80 Foresti, M. (2020) Less gratitude, please. How COVID-19 reveals the need for migration reform. Brookings Institute. May 22, 2020.

81 Fasani, F. and Mazza, J. (2020) Immigrant Key Workers: Their

Contribution to Europe's COVID-19 Response. IZA Policy Paper No. 155.

82 <https://ec.europa.eu/migrant-integration/librarydoc/inform-3-maintaining-labour-migration-in-essential-sectors-in-times-of-pandemic-covid-19>

transport and storage labourers, food processing workers).⁸³

Figure 24: Share of immigrants among key workers, by occupation – EUFL 2018 (in percentage)

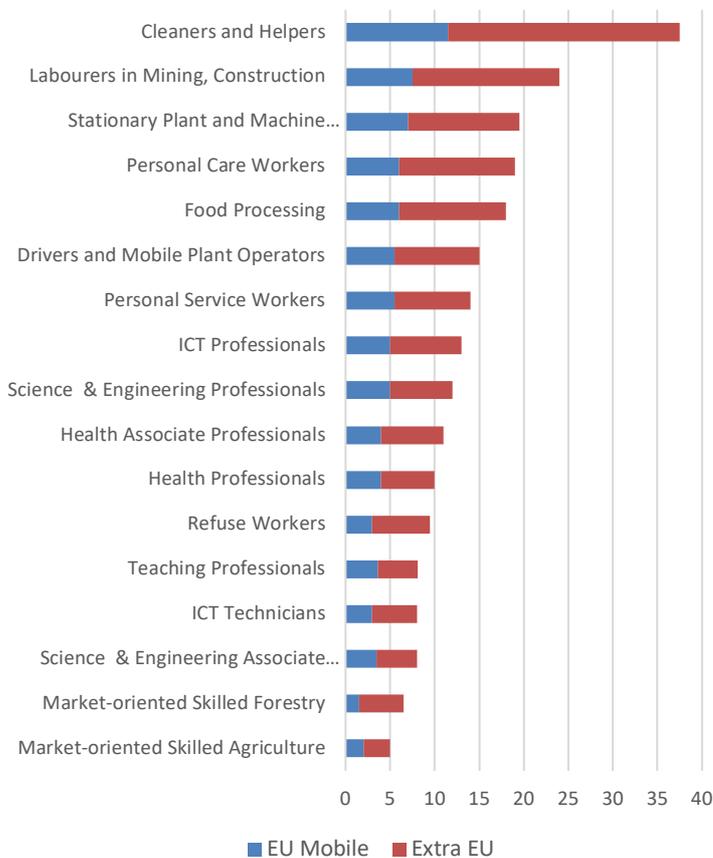
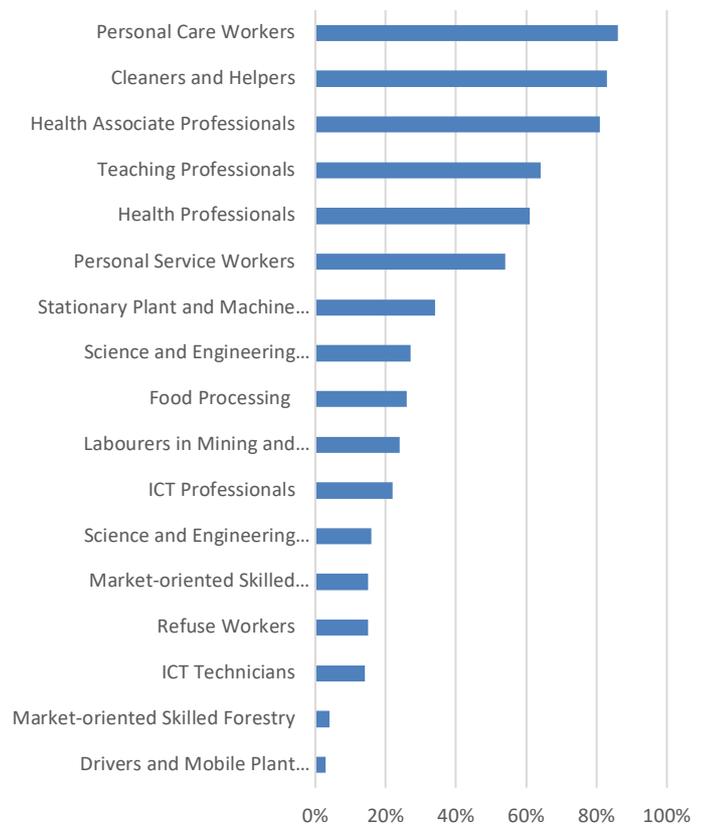


Figure 25: Share of (extra-EU) immigrant women working in each of the key occupations – EUFL 2018



Broken down by gender, the EUFL (2018) data analysed by Fasani and Mazza, shows that six categories of key occupations (personal care workers, cleaners and helpers, health associated professionals, teaching professionals, health professionals and personal service workers) are clearly female dominated, displaying shares of women above 50%, while all the other occupations have a majority of male workers. This pattern is similar for both native (EU) and immigrant workers.

Impact of COVID on migrant workers

The COVID-19 pandemic has refocused the attention on the challenging working conditions of migrants in some sectors, in particular the agricultural sector. Despite their essential roles in most EU countries, seasonal workers and key workers from Morocco, Tunisia, and to a lower extent Algeria still suffer from very low wages, as well as poor living and working conditions. Similarly, many migrants from North Africa, regardless of their profession and qualifications, found themselves without work, income or social protection overnight. Egyptian migrant workers were also directly impacted as the pandemic coincided with the collapse in oil prices in GCC countries and consequently in oil revenues, which drives the demand for migrant labour in UAE, Saudi Arabia and Kuwait. As noted by Ibrahim Awad, *‘The combined impact of the pandemic and of the drop in oil prices on Egyptian*

83 Graph from Fasani, F. and Mazza, J. (2020) Immigrant Key Workers: Their Contribution to Europe's COVID-19 Response. IZA Policy Paper No. 155: ‘For each occupation, the bars report the percentage of immigrants over total key workers for each occupation. EU mobile citizens are all those

workers who are born in a Member State other than the one where they currently work and reside. Extra-EU migrants are all those workers who are born outside of the Union.’

*migrant workers extended to Jordan, their second destination at present behind Saudi Arabia.*⁸⁴ This section focuses on the specific vulnerabilities that have particularly affected and continue to affect migrant workers during the pandemic.

Stranded between two countries

In the first few months of the crisis, North African migrants who were on temporary visa or residence holders – including seasonal workers and international students – were faced with uncertainty related to their migratory status. This situation impacted their ability to stay and/or return to their countries of origin or residence respectively, until bilateral agreements were concluded between European countries and their country of origin. When borders reopen and labour markets go back to a relative normalcy, many Algerian, Tunisian and Moroccan migrant workers and students may not return immediately because of a lack of resources to travel or family constraints, such as the need to provide care to family members. For other migrants still in countries of destination, there may no longer be job opportunities available, especially for those employed in the services sector, like tourism, whereas agriculture is expected to remain the main sector for hiring in the short and long term.

The increased risks of irregular migration

The closure of borders in North African countries has affected traditional irregular migration routes, changed strategies and increased risks and uncertainties. The mobility constraints imposed by the pandemic have not deterred migrants from risking their lives to reach Europe: since the beginning of 2021, 10,000 migrants and refugees have arrived on the Italian coast and almost 4,300 on the Canary Islands.⁸⁵ Official estimates of the number of deaths, according to the UNHCR, are, as of mid-May 2021, more than 550 deaths, an increase of more than 200% compared to the previous year. While this component is essential for understanding the challenges of migration between Africa and Europe in terms of protection and humanitarian aid, it is no less

essential in terms of labour market analysis. In a context of increased precariousness of work, whether formal or informal, partly linked to the current crisis, the abuse and exploitation of the situation of irregular migrants represents a legal, ethical and societal challenge.⁸⁶

Non-existent social safety net in countries of origin and destination

Given the sectoral composition of their jobs and their limited ability to work from home, low-skilled migrant workers from North Africa have been particularly hit by the current crisis. As noted by OECD and World Bank analysts, the important difference to previous recessions is that the current pandemic negatively impacts sectors that offer entry-level jobs (e.g., tourism, hotels and restaurants, retail). In both EU and North African countries, the sectors which used to absorb part of the downward pressure on employment in previous recessions are currently affected the most. In this crisis, the lack of net safety has been particularly felt by households in North Africa. Tunisian families with unemployed parents received the equivalent of 80 euros in May and again in September 2020: 160 euros for a family for the whole year 2020. But single people or couples without children have not received anything. In this country, according to the World Bank, 59% of workers who lost their jobs during the lockdown received no salary, 30% kept their salary and 10% received only part of it. In Morocco, 44% of low-income households received nothing at all during the lockdown (compared to only 10% of the better-off).⁸⁷

Poor protection and access to services in Europe

North African migrant workers (in the formal and informal sector) face additional hardship in European countries, compared to native workers. In addition to lack of access to health care and information on COVID-19 prevention, many migrant workers are at greater risk of contracting and transmitting COVID-19. Crowded working conditions, workers living in communal worksite housing and continued operations of high-risk facilities have been cited as variables contributing to spreading COVID-19 in

84 Awad, I. (2021). Ibidem.

85 <https://news.un.org/fr/story/2021/04/1094972>

86 <https://www.unhcr.org/fr/news/briefing/2021/5/60915977a/hcr-lance-alerte-nombre-croissant-deces-refugies-migrants->

[mediterranee.html#:~:text=By%20other%2C%20the%20HCR%20is,more%20than%20200%20per%20cent.](#)

87 Faujas, A. (2020) « En Afrique du Nord, la Banque Mondiale craint “une reprise chaotique” », Jeune Afrique, 20 octobre 2020.

many essential lines of work and confirm that migrants in high-income countries are at increased risk of infection and death due to COVID-19.⁸⁸ This situation is compounded by inadequate access to health care and social security services. And finally, while the current crisis has raised awareness on the fact that short-sighted and discriminatory policies were affecting migrants, evidence confirms that unequal access to health care, bad housing conditions and crowded workplaces imply risks for the society at large and not only for migrant workers who are directly affected.⁸⁹

Gender as a compounding factor

The situation of the 7,200 Moroccan women hired to pick strawberries in Huelva received some mediatic attention and shows that the disruption to the informal economy disproportionately affected women. For many, compliance with COVID-19 restrictions is not an option, as their households are dependent on daily earnings for survival. In these conditions, the lack of access to social safety nets places migrants at increased risk of contracting the virus, human trafficking, and labour exploitation, as women migrants try to find ways to continue making a living. The case of the province of Huelva, which was in the news during the pandemic, is emblematic in this respect: *'It is a concerted policy of migration between Morocco and Spain... And these policies are clearly gendered.'*⁹⁰ It is however important to distinguish between women who benefitted from the GECCO programme between Morocco and Spain and had access to basic social protection safety nets (albeit in ways which may not be fully satisfactory) and those who were in almost completely irregular situations.⁹¹

Box 5: Collective Management of Hiring in Origin' programme (GECCO) – Spain

In bilateral collaboration with Morocco, Spain publishes an annual 'Collective Management of Hiring in Origin' (GECCO) programme, whose objective is to regulate the conditions, requirements and characteristics of a temporary contracting regime applicable to

third-country nationals - and in particular with Morocco. For Spain, the central issue is of course the agricultural question, whether it is the grape harvest or the Huelva strawberries. Most temporary workers are hired in spring and summer for red fruit collection campaigns, primarily from Morocco, and are women. These workers are critical to fill open positions, which are advertised at the national level and only when they cannot be filled in this way, are opened to third-country nationals. Most of the seasonal workers have been employed repeatedly for several years, so the GECCO programme implemented in cooperation with Morocco is being regarded as a good practice of circular migration. Given the recurrent scandals about the working conditions of North African, Romanian and Albanian seasonal workers in Spain, Italy and France, it is now urgent to ensure that the law is respected: *'beyond the effects of announcements and websites, if these programs have something positive to contribute, this must be discussed, put into practice, controlled and possibly extended'*.⁹²

(Source: EMN Spain and EMN 2020)

Remittances: counter-intuitive resilience?

Remittances play a vital social and economic role,⁹³ especially in Egypt, as Awad further points out: *'They help the families receiving them meet their subsistence needs [and contribute] to the current account balance, which helps to bridge the gap resulting from Egypt's chronic trade deficit'*.⁹⁴ Egypt receives the largest inflows in North Africa and the sixth largest of any country in the world, totalling \$26 billion in 2019. Inflows to other countries are much lower, with \$7 billion to Morocco, \$2 billion to Tunisia and \$1.8 billion to Algeria. These remittances from both diaspora and migrant workers to Egypt in 2019 were equal to 9% of the country's GDP, 6% for Morocco, 5% for Tunisia and 1% for Algeria.

At the household level, at a time of crisis, remittances are an essential safety net for the population, as emphasised by Kalantaryan and McMahon, who note that *'people who receive remittances in the MENA countries studied tend to be less economically active than those who do not receive remittances. Two-thirds (65 per cent) of those who receive remittances are economically inactive (48 per cent) or*

88 Gagnon, J. (2020) COVID-19: consequences for international migration and development (Paris: OECD).

89 Milan, A. and Cunnoosamy, R. (2020) COVID-19 and migration governance: A holistic perspective. Migration Policy Practice, Vol. 10, Number 2, April-June 2020.

90 Zeneidi, D. (2011) Worksite Camps for Seasonal Female Moroccan Workers in Huelva (Spain): Invisibilization and Identity Assignment. ADES, Université Bordeaux-Montaigne.

91 European Migration Network (2020). Attracting and protecting the rights of seasonal workers in the EU and the United Kingdom – Synthesis Report. Brussels: European Migration Network.

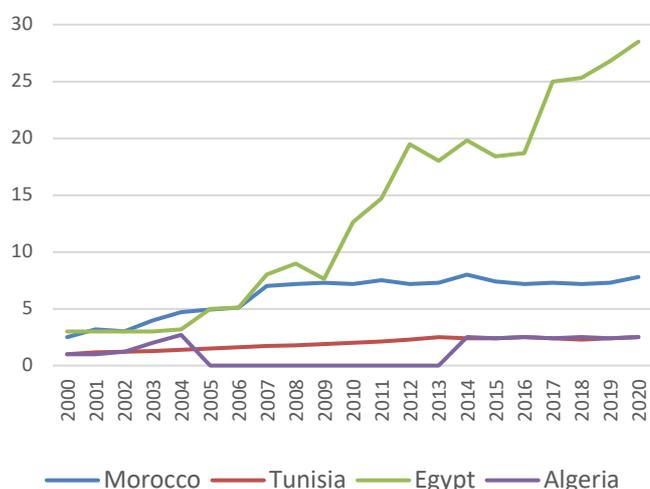
92 Key informant interview with RSMMS network.

93 Chaabita, R. International migration, remittances and socio-economic development in Morocco: An empirical analysis, International Union for the Scientific Study of Population (IUSSP), 2017.

94 Awad, I. (2021). Ibidem.

unemployed (17 per cent). But those who receive remittances also tend to have a stronger economic standing, as frequently receiving remittances is associated with a greater tendency to be able to save money, especially if we focus on those with the most frequent and stable source of inflows: whereas 31 per cent of those who receive remittances monthly are able to save, only 10 per cent of those who never receive remittances are.⁹⁵ In addition to the direct economic effects of lost remittances, studies show that international remittances from migrants to their families reduce child labour and keep children at school.⁹⁶

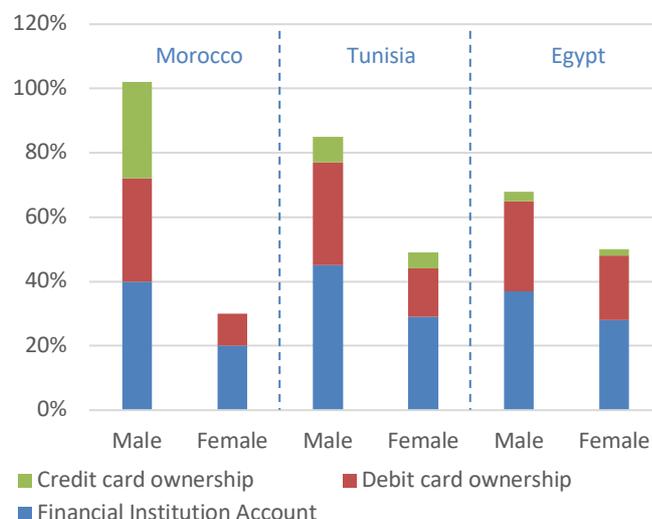
Figure 26: Volumes of remittances per country (2000-2020)
Source WB-KNOMAD



Preliminary World Bank analysis in 2020 predicted a decline in remittances for all low- and middle-income countries of 7% in 2020, followed by a further decline of 7.5% in 2021.⁹⁷ At the global level, Ratha et al. had estimated that remittances to North African countries would fall by 20% in 2020, compared to 2019, due to the global slowdown⁹⁸ By contrast, according to the latest revised World Bank estimates, remittances to Egypt, Morocco and Tunisia grew in 2020 relative to 2019 by 6.5%, 6.5% and 2.5% consecutively, while remittances to Algeria remained virtually unchanged. As Gagnon

suggests, such a surprising trend may result from the 'counter-cyclical nature' of remittances, with migrants tending to increase remittances during economic downturns, regardless of their own circumstances, in order to contribute to the well-being of their families or communities.⁹⁹ For policymakers on both sides of the Mediterranean, this unexpected news in today's chaotic and uncertain environment calls for targeted support linked to the development of digital means of payment as well as better financial inclusion in both destination and origin countries – throughout the migration cycle and in relation to diasporas. And the potential is huge. The figure below provides draws a rapid picture of the percentages of women and men aged 15 or over who have a financial institution account, debit card account, or credit card account. Of particular note are: 1) the low access to banking services (savings, cards, in particular); 2) the confirmation of the lower financial inclusion of women. The recent OECD summit on post-COVID strategies in the MENA countries particularly addressed this issue.¹⁰⁰

Figure 27: Access to institutional financial instruments in Morocco, Tunisia, and Egypt (by gender)



Data from the MENA-OECD Government Business Summit (30-31 March 2021). As percentages are cumulative, totals can exceed 100% (up to 300% in theory), based on World Bank Group (2018).

95 Kalantaryan, S. and McMahon, S., Covid-19 and Remittances in Africa, EUR 30262 EN, Publications Office of the European Union, Luxembourg, 2020.

96 Ebeke, C. H. (2010) 'The Effect of Remittances on Child Labour: Cross-country evidence', Economics Bulletin, vol. 30, no. 1, 2010, pp. 351–364.

97 World Bank (2020) Migration and Development Brief 32: COVID-19 World Bank (2020) Crisis Through a Migration Lens (Washington DC: World Bank Group and KNOMAD).

98 World Bank (2020) Migration and Development Brief 32: COVID-19 Crisis Through a Migration Lens (Washington DC: World Bank Group and KNOMAD, available online at

<https://www.knomad.org/publication/migration-and-development-brief-32-covid-19-crisis-through-migration-lens/>;

99 Gagnon, Jason (2020) COVID-19: Implications for International Migration and Development. Paris: OECD.

100 MENA-OECD Government Business Summit (30-31 March 2021) - Session 3: An eco-system for youth economic empowerment.

KEY POLICY TRADEOFFS

Analyses of the pandemic situation at regional and transnational levels have emphasised the lack of a concerted and multilateral approach. Labour migration is already a key priority for the African Union Commission (AUC) and its Member States on the African continent, as reflected in the Revised Migration Policy Framework for Africa (MPFA) and its Plan of Action (2018-30), and the Joint Labour Migration Governance Program (JLMP).¹⁰¹ But at a time when there are many uncertainties about the health situation – globally and nationally – it is probably time to take the next step, by responding to current emergencies while reforming for the longer term. Failure to do so could well affect the political reading of migration between the two shores of the Mediterranean. In the words of Schöfberger and Rango (2020), COVID-19 and migration require transnational approaches, however, *‘diversified impacts of the pandemic on national societies and economies may lead to wider divergence in migration related priorities for States within regions, and further hinder the identification of shared approaches on migration that are currently being discussed at the level of the African Union, ECOWAS, Arab Maghreb Union and European Union. In this way, it may reinforce current trends towards tightening border controls.’*¹⁰²

In this regard, a common and alternative policy goal seems appropriate, with a shift from politicised 'migration management' to a more collaborative socio-economic paradigm focusing on protection, skills, jobs and legal channels. As highlighted by Kumar et al. (2021), the questions are: *‘How do we sustain these reforms beyond the pandemic? How do we go beyond the usual emergency/crisis narrative that so often taints migration debates and leaves us with little space for a balanced, rational, and politically viable approach to reform?’*¹⁰³ This last section presents perspectives to feed future dialogues between actors on both sides of the Mediterranean on the issue of mobility and labour migration.

Existing labour migration frameworks: questioning the strategy and narratives

What do we learn from current confirmed COVID-19 related labour migration policy decisions in Europe and North African countries? What role will skills-based migration play in future labour mobility schemes (both North South and South South) in view of the EU Migration Pact?

Trade-off #1: From politicised to political dialogues

The current solutions of restricting movement of Africans, securitisation of migration and conditionality-based migration cooperation are costly to both governments and migrants and have mixed results. Moving forward, migration policies and cooperation between European and North African countries should be designed in a comprehensive and consultative way to ensure that states, migrants and other relevant stakeholders, including the private sector, contribute to finding and developing better mobility outcomes.¹⁰⁴ *In this respect, what legal, administrative and formal modalities could facilitate the mobility and integration of North African migrant workers in the EU? How can social partners and stakeholders (including the RSMMS network, as well as civil society organisations) be better involved in this dialogue?*

Trade-off #2: Assessing the reality of brain drain phenomena

The challenges of North Africa's development require a singular effort to train and maintain its human resources on its soil – in particular its most highly skilled workers. Pre-COVID-19 increasing brain drain suggests that *‘it will take more than an incentive to patriotism to bring back the executives settled abroad or to dissuade those*

101 The latter was developed by the AUC in close collaboration with the ILO, IOM, and the United Nations Economic Commission for Africa (UNECA) and adopted by African Union member states in January 2015.

102 Fargues, P., Rango, M., Borgnas, E. and Schöfberger, I. editors (2020) Migration in West and North Africa and across the Mediterranean : trends, risks, development and governance, IOM Geneva.

103 Kumar, C., Oommen, E., Fragapane, F. and Foresti, M. (2021) Beyond gratitude: Lessons learned from migrants' contribution to the Covid-19 response, ODI, London.

104 O'Brien, M.L. and Eger, M.A. (2020) Suppression, Spikes, and Stigma: How COVID-19 Will Shape International Migration and Hostilities toward It. International Migration Review, November 2020.

tempted by an extraterritorial professional adventure'.¹⁰⁵ Perhaps it would be more judicious for EU countries to partner with North African countries in their evolution by exchanging their respective workers within the framework of fixed-term work contracts?¹⁰⁶ How can EU countries avoid triggering a de facto brain drain and help highly skilled North African better contribute or return to their countries of origin? How could sending North African countries improve the living and working conditions of academics and researchers, facilitate the movement of students and researchers, encourage the return of graduates, and help them form a diaspora?

Box 6: Collecting and Analyzing Socio-Economic Data to Inform Policy Dialogue in North Africa

The statistical capacity score is an index assessing the capacity of countries statistical systems: ability to collect, analyse and disseminate high-quality data about its population and economy. It is an important socio-economic indicator to guide private investment and inform realistic programme and policy formulation. This chart shows the significant backlog in Morocco, Algeria, and Tunisia in the areas of statistical data collection and analysis. The lack of significant progress in this area remains a handicap for informing national or regional strategies in the field of mobility because 'the issue of migration is not just about flows, routes, or hubs – which is a useful but rather politicised and basically incomplete approach.'¹⁰⁷ Other socio-economic variables need to be integrated to get a good understanding of the phenomena, whether it is labour migration or other forms of mobility.

Figure 28: Statistical capacity score (WB - ILOSTAT – 2020)



Trade-off #3: A broader understanding of mobility in the Mediterranean

North African and European countries need to devise responsive policies that promote safe and legal migration pathways as alternatives for migrants – often coming from West and Central African countries – who make the perilous and often deadliest journey across the Mediterranean.¹⁰⁸ Current schemes can be reviewed to include broader categories of migrants and thus contribute to mitigating the tragic situation in the Mediterranean. Beyond the existing and traditional focus on criminal networks and migrants' use of smugglers, what formal mechanisms could enable these migrants to contribute – according to their qualifications and skills – to local labour markets on a temporary or regular basis?

Trade-off #4: Rethinking the understanding of 'key workers' in the EU

For both skilled and low-skilled migrant workers, labour market access barriers for migrants and poor employment conditions, such as inadequate recognition of skills and lack of social assistance, stifle migrants' economic contributions in countries of transit and destination, and limit their ability to support their communities in countries of origin. Elaborating on existing pilot skills mobility partnerships, African and EU countries may seek to expand access to legal migration pathways for different types of skilled workers from Africa and North Africa in particular. While the new Pact on Migration and Asylum proposes to pilot talent partnerships, including with African countries, a key lesson learned from COVID-19 is that 'immigration policies must go beyond inflexible 'low' and 'high' skills classifications. The response to the Covid-19 emergency has demonstrated the need for essential workers at all skill levels, who will be even more essential now in the long path to recovery for our health, economies and societies.'¹⁰⁹ How do we move from a narrow understanding of chosen migration (highly skilled) to a more sustainable and balanced notion of skills? What legal pathways to migration and mechanisms should be designed – for various categories of skills and

105 Maingari, D. (2011). Exode des cerveaux en Afrique : réalités et déconstruction du discours sur un phénomène social. *Éducation et sociétés*, 2(2), 131-147.

106 Almalki, R. (2011). Vous avez dit : immigration choisie ? *Cités*, 2(2), 113-118.

107 Interview with the World Bank, June 2021.

108 Awad, I. (2017). Towards a Joint Approach to Migration and Asylum in the Euro-Mediterranean Space," in *Beyond the Migration and Asylum Crisis*, edited by Ferruccio Pastore (Aspen Institute Italia)

109 Kumar, C., Oommen, E., Fragapane, F. and Foresti, M. (2021) *Beyond gratitude: Lessons learned from migrants' contribution to the Covid-19 response*, ODI, London.

qualifications, including both low and highly skilled professionals – to optimize a mutually beneficial labour mobility process?

A new deal for countries of origin, destination and migrant workers

What will be the new skills and competencies in demand post Covid-19? What will be the role of the platform economy? How can it be regulated for the benefit of countries of origin, destination and the migrant workers them-selves?

Trade-off #5: Operational knowledge based platform

A gap still exists in terms of defining, informing, sharing and objectively analysing data on labour migration between North Africa and Europe. The development of policy approaches based on evidence gathering and regular, nuanced analyses is among the MPFA's recommendations. Beyond data collection, institutional arrangements such as THAMM can contribute to an improvement of cooperation, but it is necessary to go further, towards formalised regular collaboration on constantly evolving issues – such as the labour market but also health, social or economic crises which require a great reactivity. **What regional and transnational bodies can be utilized and / or imagined to develop greater harmonization and centralization of definitions, data collection and sharing, identification of mutual data gaps? How to avoid the current under-representation of migrant workers – in the formal or informal sector of the economy – in most studies and information collections?**

Trade-off #6: Stronger ethical standards for seasonal work (decent work) involving the diaspora

The fear over a shortage of global food supplies has raised awareness about the strategic value of the agricultural sector and the crucial role of seasonal migrant workers within it. This could begin a transformative discussion about the need to understand more holistically how migrants interact with specific economic sectors and communities – in particular in the sectors of agriculture, construction, and tourism, which all generate a lot of seasonal demand but probably require a stronger inclusion of international labour standards and migrant workers' rights. **Could bilateral and multilateral cooperation frameworks, involving countries of origin (mainly Tunisia and Morocco) and destination of migrants**

(mainly Spain, Italy and France) contribute to this effort? What could be the role of the diaspora, of diasporas - in terms of economic resilience but also of solidarity?

Box 7: Partnerships between local authorities and diaspora organisations for local development in Morocco

'The Moroccan sizeable diaspora estimated at 15% of its population, is concentrated in OECD countries, and mainly in Europe. It is a well-organised diaspora, with associations of Moroccans abroad increasingly concerned with the development of the areas of origin. This development has been very fast, and reflects on the one hand, a better integration into the destination country, while on the other hand it continues to reinforce a positive perception of migration in both destination and origin countries. A case of interest is that of Migrations et Développement (M&D), an NGO established in 1986 in France as an Organisation de Solidarité Internationale Issue des Migrations (OSIM), that operates between Morocco and diaspora networks in France. M&D promotes a modality of operation that puts at the core a "Community of Solidarity Development", which is a local development collective structured as an association including diaspora members originating from the community and members of the community of origin, nurtured through dialogues, meetings and virtual networks. The local development association provides a co-financing and in-kind (technical and labour) contribution to the implementation of development projects, especially with a focus on rural areas and contribution to revitalise the rural economy, for example through eco-tourism, or provide essential services (such as local health centres). (...) Since its establishment, the association has continued to develop its collaboration with donors and international organisations, becoming a key player at the interface of local development, diaspora and development cooperation in rural areas in Morocco. (...) Considering that an increasing number of returnees to Morocco are youth and that many of them are highly skilled and establish enterprises upon return, there is an important potential in further mobilising the diaspora developmental action towards facilitating the productive return of migrants. Based on the experience in With regards to addressing the constraints of potential migrants, households and communities, it is important to stress the importance of building on the specificities of the local context, needs and policy opportunities, through the partnership between local communities, decentralised government and diaspora associations for the identification and co-funding of development projects.'

(Source: Castagnone, E. and Termine, P. (2018). Chapitre 7 - Migration des jeunes ruraux méditerranéens : déterminants socio-économiques, défis et opportunités pour l'élaboration de politiques ciblées. Dans : CIHEAM éd., MediTERRA 2018: Migrations et développement rural inclusif en Méditerranée (pp. 145-167). Paris: Presses de Sciences Po.)

Trade-off #7: Mutually beneficial exchanges in university education and vocational training

For higher education institutions and international students, the gaps created by the pandemic will need to be filled through strategic efforts. These efforts should aim to attract North African students, while understanding that the spending power and ability of internationals to pay high fees may be affected by the negative economic impact of COVID-19 in most migrant-sending countries (in particular from Morocco, Tunisia, and Egypt). Therefore, how should EU Member States and their North African partners create some positive incentives that would benefit North African students, EU Universities, academic and TVET institutions? What would be the relevant mix of scholarships, flexible mobility conditions, and tailored individual mentorship?

Trade-off #8: Assessing the migration cycle

To take full advantage of the potential of the labour market, all stakeholders need to consider the entire migration cycle. It is therefore important to design not only the pre-departure orientation phase, but also the return and reintegration phase. For example, it is essential to focus on the development of relevant professional knowledge and skills to prepare workers to access foreign labor markets; symmetrically, two-way processes and modalities should be put in place to bring the skills, techniques, and technologies that migrant workers can acquire abroad back to the country and community of origin in North Africa, which can also improve their (re)integration into the local market upon their return. How can the migration cycle be better taken into account in political and programmatic decision-making? What roles employers, social partners (unions) and other market actors can play in promoting the integration and/or reintegration of labor migrants into local markets throughout the migration cycle?

Trade-off #9: Promotion of formal economies in North African countries

To take full advantage of the potential of the labour market while ensuring decent work and expanding social protection safety nets, all stakeholders need to consider

the sharp development of a formal employment and business in a post COVID-19 scenario crisis. Several areas may be considered, such as: a better communication on the benefits of formality (access to financial services and insurance services), a simplification of and incentives for formalisation, public-private dialogue, inclusion of social partners (in particular the RSMMS¹¹⁰ network), stronger focus on gender equality, development of digital capacity.

Protection mechanisms and decent work

Can COVID-19 help decision makers and other relevant stakeholders identify new opportunities regarding the protection of migrant workers, for instance in terms of regularisation of jobs occupied by migrants (following the realization of their essential nature) or in terms of renegotiated bilateral labour migration agreements and social security agreements?

Trade-off #10: Generalisation of social services – regardless of immigration or visa statuses

A key conclusion of the present preliminary review, is that *‘among migrants, the low skilled workers are especially over-represented in a number of key occupations that are vital in the fight against COVID-19, underscoring their often neglected value within European economies.’*¹¹¹ Today’s context calls for a stronger enforcement of current policies and agreements on migrant access to social protection and equal treatment. Policies could, for instance, incorporate migrants’ needs through extending work permits and providing access to healthcare and other social services, regardless of immigration or visa status. Broadening of sustainable socio-economic reintegration programmes, in particular creating pathways towards accessing income generating activities and social protection in the country of origin is another possible way forward. How should bilateral and multilateral agreements be revisited to mitigate the COVID-19-induced risks that migrant workers face?

Trade-off #11: Localised access to services, in collaboration with RSMMS and relevant social partners

The action plan provided for in the Hammamet Declaration between Egypt, Morocco and Tunisia has

¹¹⁰ The Mediterranean-Sub-Saharan Migration Trade Union Network (RSMMS) includes among its members: UGTT (Tunisia), CFDT (France), CGIL (Italy), CGTM (Mauritania), CNTS (Senegal), CNTS FC (Senegal), CSA

(Senegal), CSI Africa, UDTS (Senegal), UMT (Morocco), UNSAS (Senegal), USTN (Niger).

¹¹¹ Fasani, F. and Mazza, J. (2020) Immigrant Key Workers: Their Contribution to Europe's COVID-19 Response. IZA Policy Paper No. 155.

important objectives to strengthen the protection of migrant workers. In particular, it aims, at a regional level, to 1) support information and training activities on migrant workers' rights; 2) promote fairer recruitment systems for migrants; and 3) strengthen dialogue, coordination and cooperation between Egypt, Morocco and Tunisia. Such an initiative recalls that migrants, whatever their status, need access to key basic services such as health, education and social protection in both North African and EU countries. The RSMMS network of unions – on both sides of the Mediterranean – has promoted the security, safety and protection of migrant workers as a cornerstone of its action. Involving RSMMS – along with other relevant stakeholders – may contribute to securing migrants' rights and enhancing both public health and economic inclusion. [How can North African and European local levels of government and leadership, such as local councils and mayors, be better resourced to implement health, education, and social protection services on the ground?](#)

Trade-off #12: Expansion of digital and financial infrastructure to support the resilience to crises of migrant workers and communities of origin

With the rediscovery of the essential role of migrants - regardless of their qualifications - in European economies as well as in the Mashreq region (in the case of Egypt), there is no doubt that the second major lesson of the crisis concerns the role of remittances. We know their place in the economy – greater than the FDIs in the countries under consideration – but we are still unaware of their functioning, which is often counter-intuitive because it is deeply linked to individual patterns that paradoxically resist the pure logic of *homo economicus*. As pointed out by Kalantaryan and McMahon, *'an increase in the use of digital money transfer services has been described as a possible benefit coming out of the crisis, as they are often cheaper and have less risk of spreading the Covid-19 virus than in-person ones. (...) For digital remittances to help mitigate the effects of the*

Covid-19 crisis, a significant expansion of digital and financial infrastructure will be necessary.' [What research, analyses, policies, and programmes are needed to better anticipate and support contextual uses of remittances in both countries of origin and residence?](#)

Trade-off #13: Legal protection and decent work

There is a need for more coordinated multilevel efforts and information services for temporary and seasonal migrants. For instance, countries of origin like Morocco, Algeria and Tunisia could have the responsibility to inform about legal possibilities to migrate for work, while EU destination countries would have the legal obligation to provide information for seasonal workers and the responsibility to connect employers and service centres. In practice, the question is at least twofold: [on the one hand, how to better match the supply and demand sides? On the other, how to provide services on employers' obligations and workers' rights, register complaints and help migrant workers benefit from legal protection and decent work conditions throughout the mobility cycle?](#)

Trade-off #14: Towards gender equality

The main sectors of integration of Tunisian or Moroccan workers, in particular, in Europe are particularly gendered. In some cases, this may be an imposition of existing socio-cultural constructs and norms (nurses, domestic workers), although some changes may have been observed with the pandemic. In other cases, it may be a matter of voluntary bilateral decisions, particularly in the agricultural sector, in order to make the workforce more flexible by hiring *'women with children, not single, in order to have a guarantee of return to their country of origin and thus avoid the presence of people in an irregular situation.'*¹¹² [Given that the COVID-19 pandemic has made women particularly vulnerable - both in North Africa and in Europe - how can policy makers ensure that women's rights are respected and protected, in line with decent work standards and fundamental human rights?](#)

112 Palumbo, L. and Sciarba, A. (2018) The vulnerability to exploitation of women migrant workers in agriculture in the EU: the need for a Human Rights and Gender based approach, European Parliament, Policy Department for Citizens' Rights and Constitutional Affairs Directorate

General for Internal Policies of the Union.
https://www.europarl.europa.eu/RegData/etudes/STUD/2018/604966/IPO_L_STU%282018%29604966_EN.pdf

GLOSSARY

There is no internationally accepted statistical definition of **labour migration**. However, the main actors in labour migration are migrant workers, which the International Labour Organization (ILO) defines as: ‘... *all international migrants who are currently employed or unemployed and seeking employment in their present country of residence.*’¹¹³

The United Nations Statistics Division (UN SD) also provides a statistical definition of a **foreign migrant worker** ‘*foreigners admitted by the receiving State for the specific purpose of exercising an economic activity remunerated from within the receiving country. Their length of stay is usually restricted as is the type of employment they can hold. Their dependents, if admitted, are also included in this category.*’¹¹⁴

However, the meaning of the term **international labour migration** has been considerably reworked and extended by the 20th ICLS Conference (ILO, 2018). It is now a generic term that refers, in general, to ‘*concepts related to the process and outcome of international labour migration*’ and, in particular, to the following three concepts: (a) international migrant workers; (b) for-work international migrants; (c) return international migrant workers.’ Moreover, the specific categories of workers that now fall under the umbrella of ‘international labour migration’ and are considered as ‘international migrant workers’ include: (a) frontier workers, (b) seasonal workers, (c) itinerant workers, (d) project-tied workers, (e) specified-employment workers, (f) self-employed workers, (g) seafarers, (h) workers employed on an offshore installation (i) foreign domestic workers; (j) foreign

students; (k) international travellers on tourism trips whose main purpose is to be employed in the country of visit (l) working or seeking work refugees and asylum-seekers, irrespective of authorization to work during processing of refugee status or sanctuary request; (m) forcibly displaced persons across borders due to natural or human-made disasters, working or seeking work in the country of displacement; (n) persons trafficked across international borders for forced labour or labour exploitation.¹¹⁵

Sectors such as food processing, delivery, or health care are vital for keeping the economy and vital services running. Workers in those occupations are also referred to as **key workers**. Migrants play an important role in those essential services, accounting for 14% of key workers across European regions, with 5% from EU countries and 9% from non-EU countries. Based on the most recent wave (2018) of the EU Labour Force Survey (EULFS), the largest five categories of key workers in the EU are: teaching professionals (14.5% of all the key workers), skilled agricultural workers (11.9%), science and engineering associate professionals (11.1%), personal care workers (10.3%) and cleaners and helpers (9.9%).

To designate the regional space composed of Morocco, Algeria, Tunisia, Libya and Egypt as a whole, the term ‘**North Africa**’ will be preferred, as it allows for the designation of a transnational space of mobility both in relation to other parts of the African continent and to the other side of the Mediterranean.

113 https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/documents/publication/wcms_436343.pdf

114 <https://unstats.un.org/unsd/statcom/48th-session/documents/BG-4a-Migration-Handbook-E.pdf>

115 ILO (2018) ICLS Guidelines concerning statistics of international labour migration - 20th International Conference of Labour Statisticians Geneva, 10-19 October 2018 https://www.ilo.org/wcmsp5/groups/public/---dgreports/---stat/documents/meetingdocument/wcms_648922.pdf

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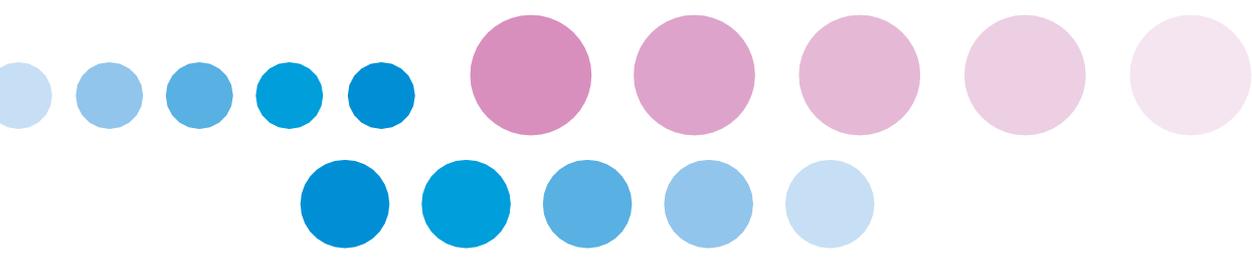
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