



Evolving patterns and impacts of migration

Global societal trends to 2030:
Thematic report 4

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EUROPE

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Abbreviations

BEPA Bureau of European Policy Advisers

BRIC Brazil, Russia, India and China

ESPAS European Strategy and Policy Analysis System

IDPs internally displaced persons

OECD Organization for Economic Cooperation and Development

Preface

This Research Report forms part of our series on global societal trends and their impact on the EU in 2030. This analysis is embedded within the framework of the European Strategy and Policy Analysis System (ESPAS) set up to develop a lasting framework to assess global trends and to develop policy responses across EU institutions over the next institutional cycle (2014–2019). The first phase of the project assessed the long-term, international, domestic, economic and political trends facing the European Union over the next two decades; the second phase of the project split trends into three streams, namely the economy, governance and power, and society. RAND Europe’s assessment of likely global societal trends constituted ‘Trend Report 2 - Society’ for this second phase.

This report presents the evidence base, uncertainties and potential trajectories surrounding trends in one of the six major themes which form part of Trend Report 2 – Society, namely the evolving patterns and impacts of migration. Other themes studied as part of this series include: the rise of a global middle class; the spread of information and knowledge through technology, the new media and education; the empowerment of individuals; the changing demographic profile of the world’s population; and transformations in the world of work and the labour market. Overall findings from all reports can be found in the overall Synthesis Report published by RAND Europe, whilst evidence on the other themes can be found in the Research Reports published as part of this series.

This work is based on desk research in the form of a non-systematic review of the academic and grey literature on the major trends for this theme. It also includes additional information for each of the themes studied which was harnessed through a Delphi with international participants, as well as a series of semi-structured interviews with experts from academia and think tanks, policymakers, and leading thinkers from the private or voluntary sector further exploring the findings from the Delphi exercise and desk research. Acknowledgements, and a full list of contributors, can be found in the Synthesis Report.

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Introduction

1.1. The context for this study and the European Strategy and Policy Analysis System effort

Over recent years, the European Union has experienced a number of challenges. Facing these issues has required much effort from European policymakers. These reflect the unstable and fast-changing global environment in which the Union is navigating. In the long term, this may challenge the Union's economic and political influence, and perhaps its ideals and values.

In this new context, expanding the Union's capacity to anticipate future challenges and outcomes and to coordinate responses across institutions will be crucial. The objective of this study was to help the European Union to prepare for a future strategic landscape that will be more competitive and perhaps less cooperative than before, and certainly more uncertain than a superficial reading of opinion pieces and forward-looking reports might suggest.

The European Strategy and Policy Analysis System (ESPAS) project emerged in 2010 when the European Commission sought to investigate the global trends that will prevail in 2030 and to determine the challenges that European policymakers will be faced with in the coming decades. Its purpose is embedded within a wider context of building a permanent EU forecasting capacity, relying on the collaboration of various EU institutions and actors in the individual Member States, and it also aims to set up a continuous framework to assess global trends and to develop policy responses across the EU institutional framework.

The initial effort, carried out by the EU Institute for Security Studies (EUISS 2012), aimed at assessing 'the long-term, international and domestic, political and economic environment facing the European Union over the next 20 years'. The report acted as a pilot project setting the scene for further investigation and evaluation of global trends in 2030 in the field of (i) international relations and governance, (ii) society, and (iii) macroeconomic trends.

In 2012, the Bureau of European Policy Advisers (BEPA) commissioned RAND Europe to investigate further the theme of societal changes by drawing from the experience of the pilot project, by analysing key global trends in this field and by drawing their implications for the Union. The task force at BEPA identified six main thematic areas which were to be refined, documented and analysed, namely:

1. The rise of a global 'middle class'
2. The role of new technologies, new media and increased access to education
3. The empowerment of individuals

4. The changing demography of a globalised world and its impact on different societies
5. The role of mobility and migrations and their impact on identities
6. Old and new labour – and work.

Each of the research reports published as part of this series revolves around one of the six themes. This report focuses on education, technology and connectedness. The overall findings from the analysis may be viewed in the Synthesis Report (Hoorens et al., 2013). The research team has sought to cluster the trends identified above into five major areas in the Synthesis Report. In addition, the Synthesis Report introduces a number of cross-cutting issues that may interact with each of these six themes to influence the long-term strategic landscape and the policy challenges that the European continent may face in the future. In doing so, it relies extensively on strategic and long-term analysis, an approach which may help policymakers grasp the contours of the future and understand how global trends are likely to interact, converge and influence the future landscape.

1.2. The methods used for this Research Report designed to set out the evidence base for major trends

This Research Report presents the reader with findings on the evolving patterns of migration, as well as on their impact on the EU landscape, including potential policy challenges for the next 20 years.

Several reports – most of which are referenced in this analysis – have attempted to describe, assess and determine which trends are likely to shape the international strategic landscape or the landscape of a specific region, the EUISS report and the regular efforts of the National Intelligence Council being perhaps among the most notable examples in this context. The objective of the research team as a result is not to replicate these existing efforts, but rather to bring the existing uncertainty surrounding these trends to policymakers' attention.

The findings analysed in this report are based on two phases of research, namely a non-systematic review of the literature available on each of the major trends listed under the six themes identified by ESPAS for the Society Trend Report, and analysis of the quantitative data available. Our approach is designed to identify the consensus as well as the disagreement on a given trend within a specific theme, and therefore to describe this trend, relying on previous analysis and literature. It has allowed the research team to identify the drivers behind the trends and the conditions and assumptions under which they will materialise. The team has sought to review and discuss the evidence for these assumptions and conditions and the level of uncertainty surrounding them. When appropriate, and relying on the assessment of this uncertainty, the researchers have been able to generate alternative narratives for specific trends, which stand in contrast to the consensus.

The second phase of the research (expert consultation) harnessed the knowledge of leading experts worldwide for each of the themes studied through an approach based on the Delphi method. This effort was followed by a series of interviews with leading academics, policymakers and thinkers from the private or voluntary sector to build on findings from the Delphi exercise. Information from the expert consultation phase was used to discuss and to uncover further the surrounding uncertainty for each of the global trends derived from the literature review.

This approach is not, of course, without limitations. The report considers trends one by one and therefore in isolation from all others when in fact they are likely to interact with each other. We try to alleviate this issue by making clear the assumptions of the literature we review.

By emphasising uncertainty and by attempting to raise policymakers' awareness of alternative narratives and paths, we hope to contribute to the debate on global trends that will prevail in 2030, and to facilitate the goals of greater flexibility and resilience. While this approach contrasts with previous, widely publicised strategic analysis reports, it also looks to complement these analyses.

Chapter 1. The worldwide impact of international migration is substantial

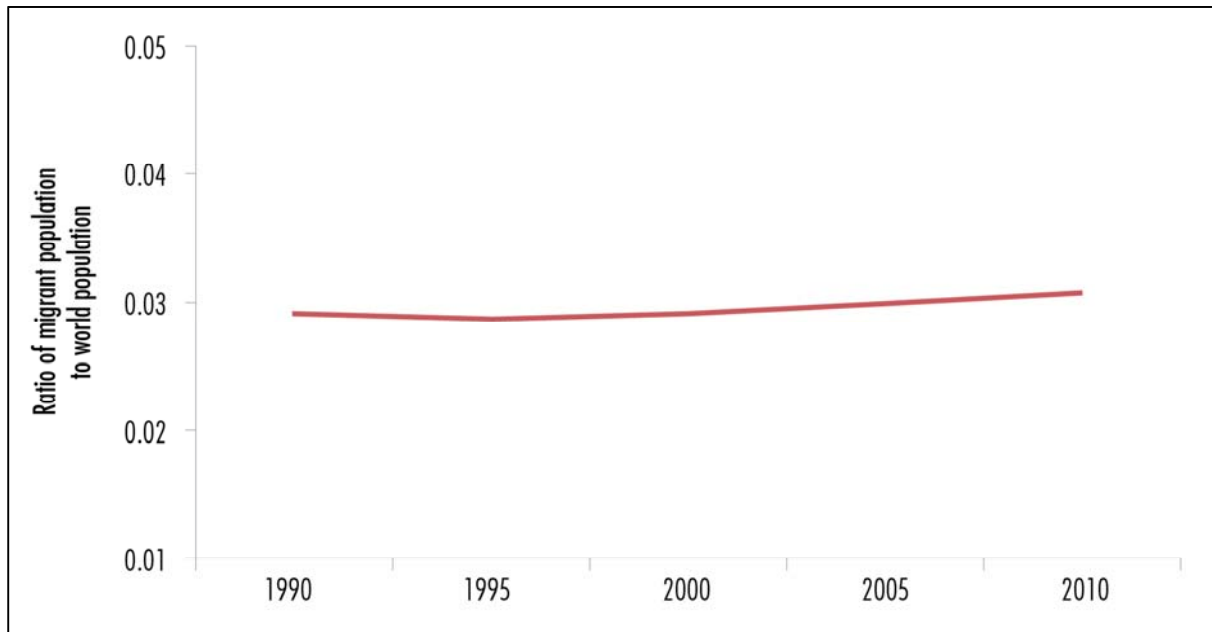
1.1. Migrants consistently comprise around 3% of the global population

International migration involves a significant proportion of the global population, either directly or indirectly. On one hand, as Castles and Miller point out, ‘the vast majority of human beings remain in their countries of birth... Migration is the exception, not the rule’ (2009:7). The vast majority of human mobility occurs within countries, rather than internationally (UNDP 2009). Over the past 20 years, however, the overall share of migrants compared to the global population has remained relatively steady, resulting in a consistent rise in the number of international migrants (see Figures D.1.1 and D.1.2). According to 2010 estimates, there are 214 million international migrants,¹ representing about 3.1% of the world population (UN Population Division 2012). This trend is likely to continue; according to the Pilot Project, the number of migrants is likely to reach 300 million in 2030 (EUISS 2012). However, the distribution of these migrants is changing as more countries enter international migration systems and current dynamics of sending and receiving countries evolve due to factors such as economic shifts, development transitions and changing policy restrictions (Czaika and de Haas 2013).

The consequences of global migration trends are felt not only by mobile individuals themselves, but also proximately by their communities of origin and destination. The changing scope and complexity of migration has far-reaching effects on societies around the world. In fact, scholars argue that ‘the impact of international migration is frequently much greater than is suggested by figures’ (EUISS 2012).

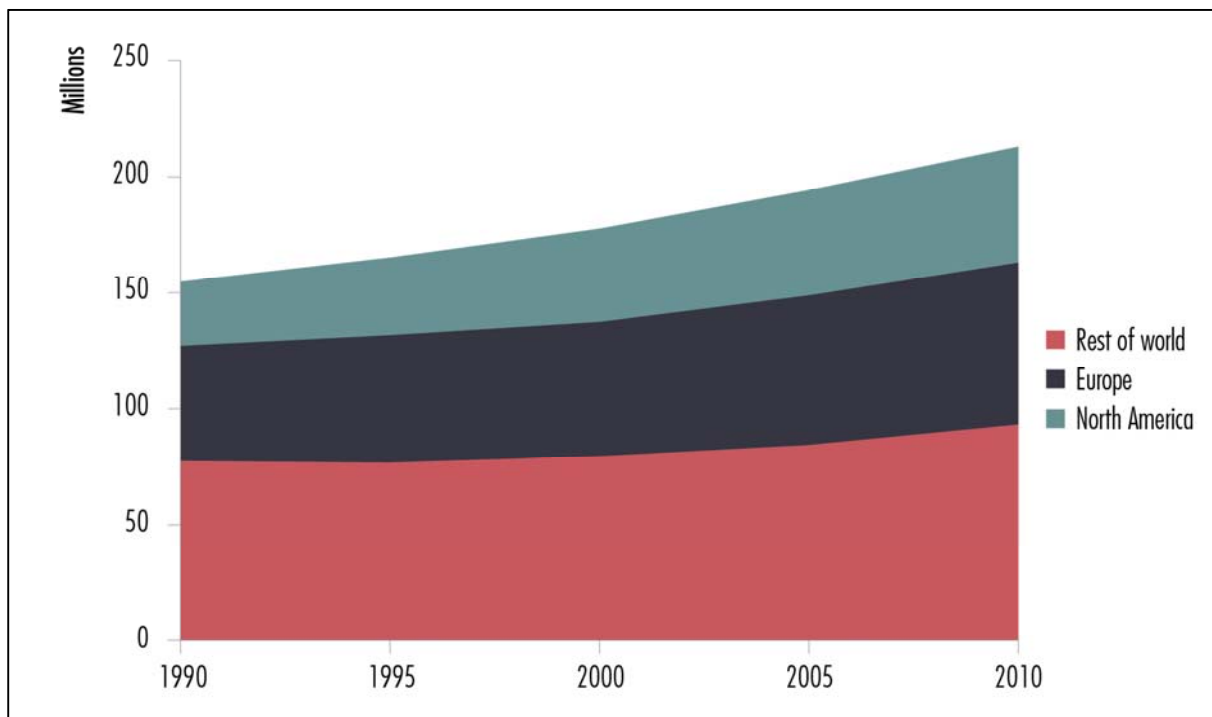
¹ It is important to stress that when analysing international migration there are limitations to having reliable and up-to-date data. This is owing to multiple factors, including variations in how different countries compile their emigration and immigration statistics and what methods they use, the challenge in accounting for undocumented migration, and the shifting nature of various migration categories (see Castles & Miller 2009).

Figure D.1.1: Migrants' share of the global population has held relatively steady around 3%



Source: International Migrant Stock. Available at: <http://esa.un.org/migration/p2k0data.asp>

Figure D.1.2: Around the world, there has been a steady increase in numbers of migrants



Source: UN Population Division, Department of Economic and Social Affairs. <http://esa.un.org/migration>

Note: The list of countries for Europe is extensive, and provided at <http://esa.un.org/migration/index.asp?panel=3v>

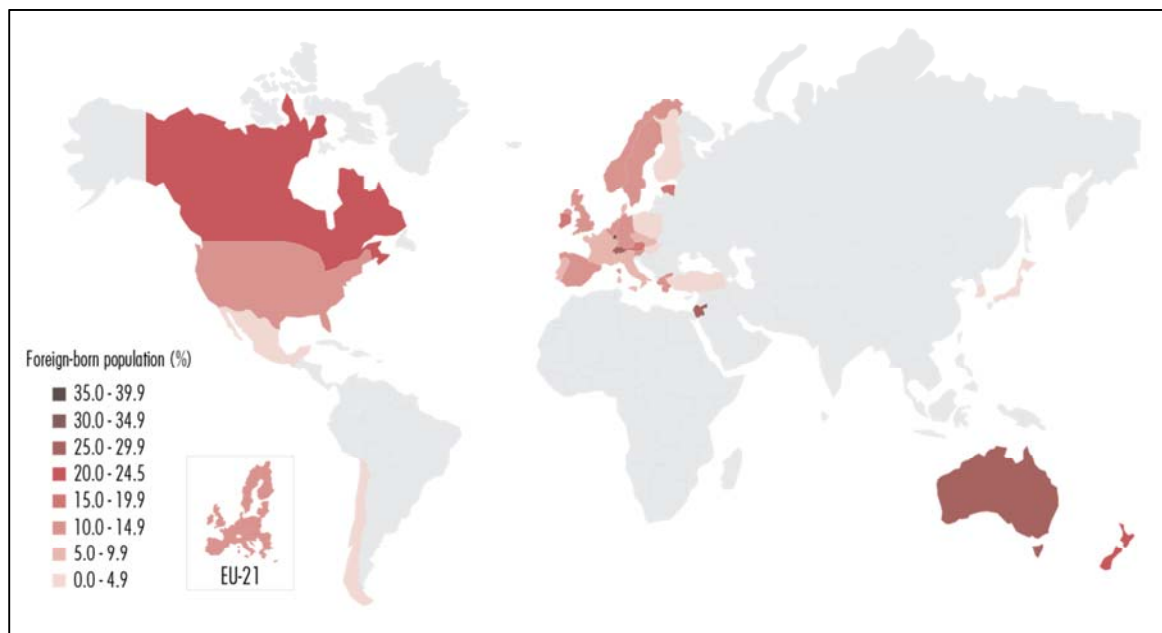
1.2. Though global migration is likely to continue at current rates, migration flows in EU Member States are more fluctuating

Among international migrants, over 75% move to a country with a higher level of human development than their country of origin (UNDP 2009). Between 1995 and 2008, migration numbers continued to increase in many of the developed countries, including EU Member States (see Figures D.1.3 and D.1.4). In fact, over the past decade ‘new immigrants accounted for 70% of the increase in the labour force in Europe, and 47% in the US’ (OECD 2012e).

In characterising European migration, it is also worthwhile to disaggregate migration from outside as opposed to inside the EU. According to the Eurobarometer survey, EU citizens rate highly their ability to travel freely with the European Economic Area and do so for a variety of reasons, including work, study and retirement (Benton & Petrovic 2013; European Commission 2010). Among the EU-27, the top destination countries are Germany, France and the UK.² It is challenging to estimate intra-EU mobility flows, as many migrants do not register upon their arrival and travel for short visits or commute. However, intra-EU mobility accounts for a smaller share of migration flows in the EU-27: intra-EU migrants make up only 2.5% of the EU population, while international migrants (‘third-country nationals’) comprise 4.1% (Benton & Petrovic 2013: 3). Looking ahead, the volume of intra-EU migration is uncertain, although the patterns of sending and receiving countries are likely to fluctuate, owing to factors such as economic conditions and EU accession (Benton & Petrovic 2013).

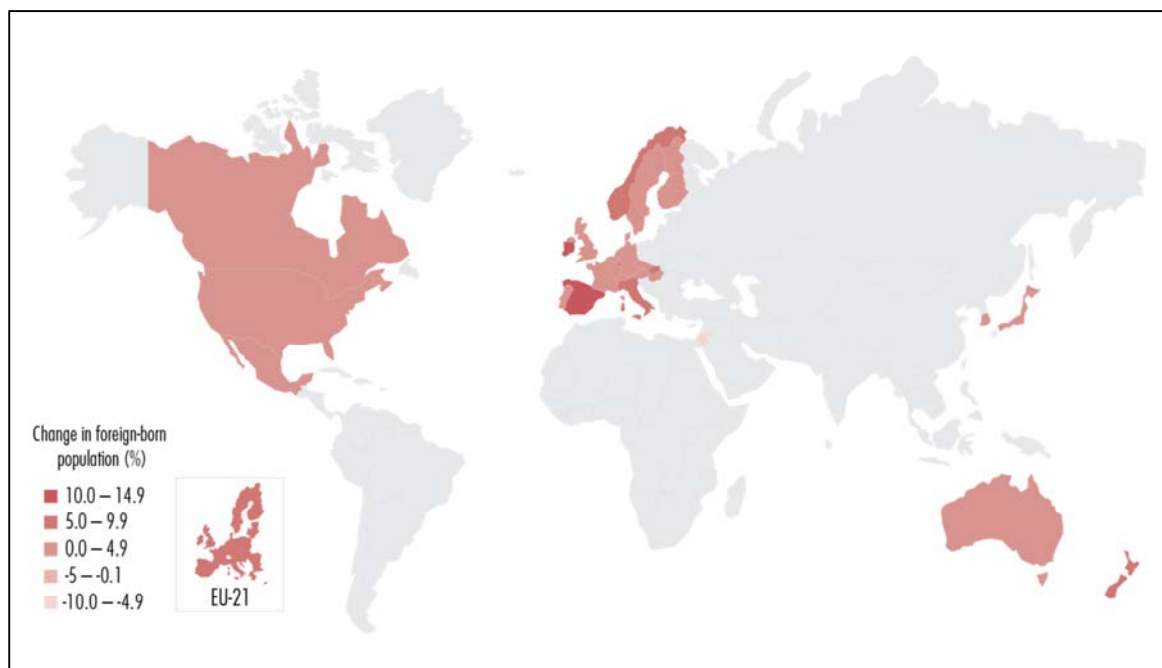
² Expert interviewees noted that the international desirability of English language skills and the relatively open British labour market have contributed to making the UK a particularly common destination.

Figure D.1.3: Stock of foreign-born population in OECD countries (% of total population), 2008



Source: OECD (2012)

Figure D.1.4: Change in the share of foreign-born population, 1995-2008



Source: OECD (2012)

Chapter 2. International migration is characterised by an evolving diversity of types and patterns of migrants

2.1. Migration decisions and routes depend on a combination of personal and structural motivations

Migration decisions depend on a variety of drivers that propel or discourage movement. Unpacking these layers of influence is important in seeking to characterise the current and future motivations of global migrants. A range of factors may influence individuals' motivations, including personal agency, social dynamics, and political and economic structures (Goldin et al. 2011: 120). Hear and colleagues classify these different drivers as *predisposing factors*, which contribute to the surrounding context; *proximate factors*, which exert direct influence on migration decisions; and *precipitating factors*, which trigger mobility (2012: 4). The evidence for how these different levels of decision interact and what exactly serves as a 'tipping point' for people to migrate remains scarce (de Haas 2011a). The wide range of factors influencing migration decisions and flows also present a challenge to disaggregating the most relevant drivers of future trends.

While there is clearly no single explanation for why people decide to migrate, authors cite economic, societal and policy factors as the major drivers of migration (Castles & Miller 2009: 30). Migrants are often motivated by economic opportunities to find a better quality of life, to improve employment opportunities, or to support families back home. Other powerful incentives include personal safety and security, and opportunities to gain empowerment or education that may be unavailable in home communities owing to factors such as discrimination, poverty and lack of infrastructure. Also migrants tend to move to places that have familiar characteristics, such as countries where they have historical roots, shared language or existing social networks. Experts note that in selecting destination countries, migrants may be influenced by national policy contexts, whether these relate directly to migration or to other relevant structural concerns such as healthcare availability and welfare support.

Given the wide variety of interacting motivations, it comes as no surprise that there is a plethora of migration types seeking to categorise mobile individuals. Countries increasingly differentiate between categories of migrant, imposing classifications such as students, refugees, labour migrants, family residents and investors. Individual migrants often change between these categories, either as national definitions change or as their own personal circumstances evolve.

In dictating these categories and their accompanying rights, policy regimes are thus a structural driver of migration trends, although their impact is highly debated. Some authors argue that migration cannot be

‘turned on and off like a tap’ by changing policies (Castles & Miller 2009: 33), and that receiving countries cannot control migration flows that are more dependent on sending country conditions. De Haas (2011a: 27) argues that immigration policies may result in four types of ‘substitution effect’: spatial, which redirect migrants to less restrictive countries; categorical, which cause migrants to adjust their legal or illegal channels of entry; inter-temporal, which cause a sudden short-term surge in migration to pre-empt policy enactment; and reverse flow, which encourage permanent settlement by migrants who otherwise would engage in circular migration. Whether achieving their goals or resulting in these substitution effects, it is clear that policies shape migration flows and decisions, having an impact on different types of migrant in different ways. In Denmark, for example, restrictive marriage migration laws have encouraged many couples to move to neighbouring Sweden, where the jurisdiction of EU law is a stronger enabler of family migration (Rytter 2011). Importantly, non-migration policies – such as labour, health and benefits systems – also shape migration dynamics, and may in many cases be more influential than targeted legislation.

While varying legal routes may thus be explored, restrictive policies also contribute to a rise in irregular and undocumented migrants who are unable to find adequate legal channels. The motivations and origins of irregular migrants vary widely, from family migrants unable to obtain visas to economic migrants unable to meet employment qualifications for sponsorship. Because irregular status is determined by non-adherence to national laws, the nature and extent of irregular flows varies depending on a given country’s available routes to legal migration, which present different types of constraints to legal mobility (Duvell 2011: 293). Where would-be migrants are unable to find legal migration routes, or are unable to afford the high transaction costs often involved in legal crossings, they are more likely to engage in irregular mobility (UNDP 2009).

2.2. Mobility decisions are not always voluntary

In addition to these various motivations driving mobility, forced migration also continues to occur in a variety of forms. For refugees, migration decisions are made out of necessity owing to factors such as conflict, persecution or environmental conditions. Refugee movements tend to be localised; according to UNHCR, the major refugee-generating regions hosted on average between 75% and 93% of refugees from within the same region (2011). While the global number of refugees has remained stable at 10.4 million (UNHCR 2013), the number of internally displaced persons (IDPs) has increased over the past 15 years, to 26.4 million in 2011 (IDMC 2012). IDPs create a particular challenge for the international community as they have not crossed national borders and hence do not qualify for refugee protection (Koser 2012). The global number of trafficked persons – including adults and children subject to forced labour, bonded labour and forced prostitution – has also remained high, with social scientists estimating that up to 27 million individuals are victims of trafficking at any given time (US Department of State 2013).

At the other extreme, involuntary immobility is also a challenging condition for many would-be migrants (Carling 2002). It is important to note that no matter how strong the economic, social or structural drivers for migration, ‘people will only migrate if they *perceive* better opportunities elsewhere and have the *capabilities* to move’ (emphasis original, de Haas 2011a). For example, the increased use of technology

and social networks to facilitate migration will be possible only if basic capabilities are in place, such as having internet access and sufficient resources to migrate. Poor people in low-income countries are most at risk of becoming ‘trapped’ populations, who are unable to relocate even when impacted upon by serious issues such as war or environmental conditions (Government Office for Science 2011).

The interaction of forced migration with forced immobility is well illustrated in the case of climate change impacts. While there has been much speculation that climate change will lead to detrimental environmental conditions, forcing mass movements from affected areas, scholars point to a lack of evidence for predicting future trends (Pigue 2010; Pigue 2012). Where climate change does have its greatest impact, it is likely that large portions of the population will be forced to remain, owing to their lack of resources for relocation. For this reason, climate-induced stresses are more likely to shape internal mobility than to result in large-scale international migration (de Haas 2011b).

2.3. Patterns of migration and structural conditions are linked to migrants’ length of stay

The various migration routes are also accompanied by different lengths of stay and commitment to migrants’ receiving countries. Expert interviews suggest that only half of international migrants are long-distance economic or settler-type migrants. Some types of migration are intended to be temporary – such as student migration and circular migration, in which migrants move back and forth between their home and host countries (Düvell et al.2011, Collyer and de Haas, 2012). Even these highly temporal trajectories may become more permanent, however, as temporary migrants may end up forming strong personal or professional connections that unexpectedly lead them to reside long term in their receiving country.

The role of networks in encouraging migration is also an important pattern that can spread mobile trajectories through entire families and communities. Chain migration, in which one migrant is followed by family members, friends or other contacts, is a powerful phenomenon that may encourage potential migrants to make a move by making the transition and integration process easier through social networks (Goldin, Cameron and Balarajan, 2011: 106). In this way, migration that began due to economic drivers ‘may continue due to social factors, even when the economic factors which initiated the movement have been completely transformed’ (Castles & Miller 2009: 33).

Length and type of stay may also be influenced by the restrictions of national policy contexts. This was seen throughout Europe in the 1970s, when many countries halted or severely curtailed temporary guestworker programmes. In a strong example of the reverse flow substitution effect (de Haas 2011a), rather than reversing these migration flows such restrictive policies caused many guestworkers to move from circular to permanent migration – often bringing their families to settle with them – to avoid losing their new opportunities. The restrictions also led to a predictable increase in irregular migration from individuals whose legal options had been severely reduced (de Haas 2007).

2.4. Future migration trends may be facilitated by technology and globalisation

In addition to the aforementioned personal and structural drivers, technology and globalisation are likely to continue to have an impact on migration flows. Technology is making it increasingly easy for migrants to travel inexpensively, to learn about the routes available and to stay in touch with family and community members abroad. In the future, the role of technology in informing and even enabling migration decisions is likely to increase, for example as a greater proportion of the global population gains internet access. Experts in the Delphi exercise tend to agree that the internet will be used by both migrants and their employers in facilitating the majority of migration by 2030, supporting both legal and illegal routes. Alternatively, expert interviews suggest it is possible that the rise in remote communication and employment, facilitated by new online technologies, will render some migration unnecessary.

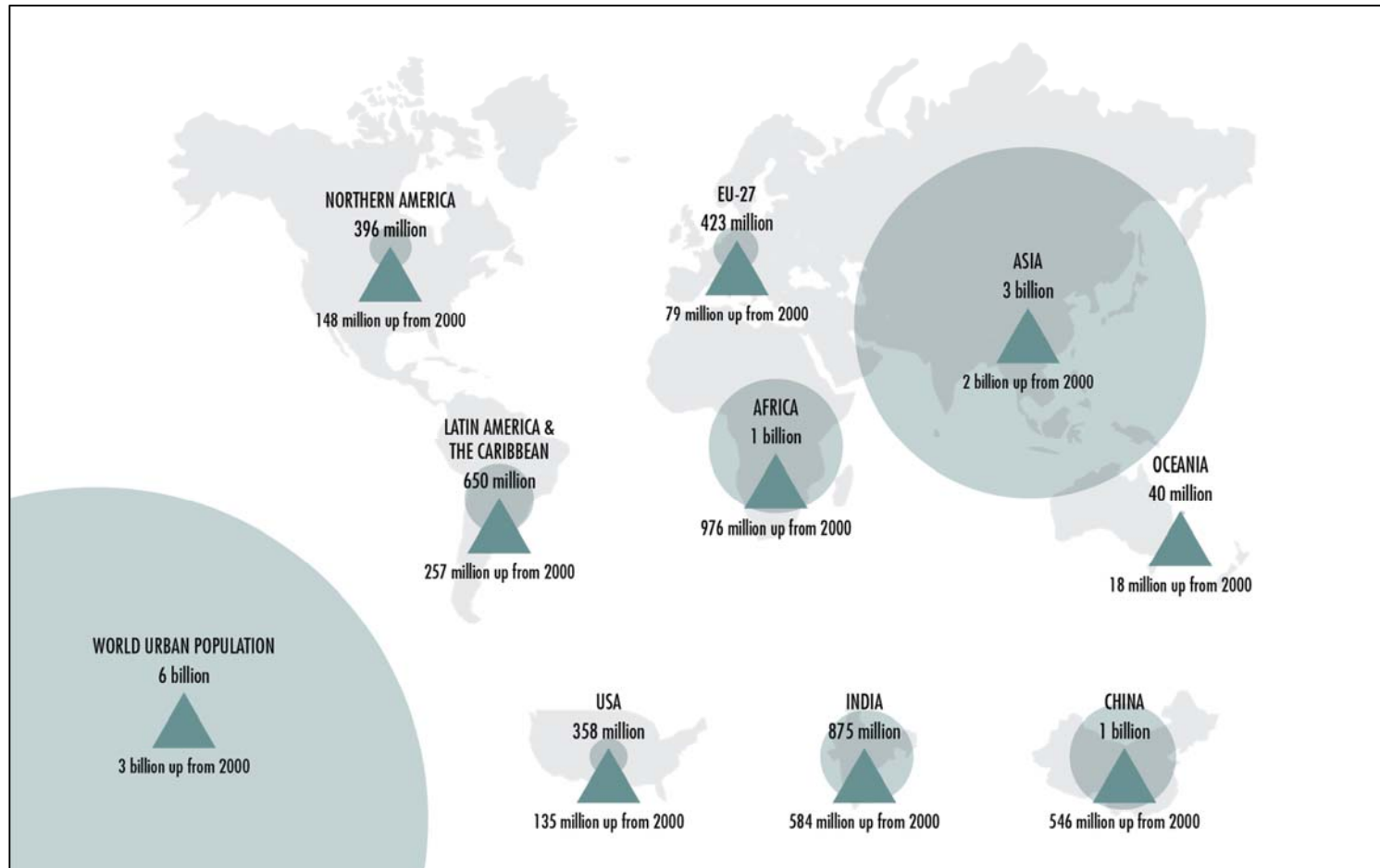
On-going globalisation is likely to continue supporting migration trends as well, as media, languages and businesses increasingly spread across borders. As cultures increase their rate of interaction, migration will become an increasingly common and familiar option in communities around the world. As with technology, however, globalisation may also in some cases have the opposite effect on mobility by providing outsourcing opportunities that reduce the need for migration (de Haas 2009: 13).

Chapter 3. Globally, internal migration will continue to be both a driver and a result of urbanisation

3.1. An increasingly urbanised population

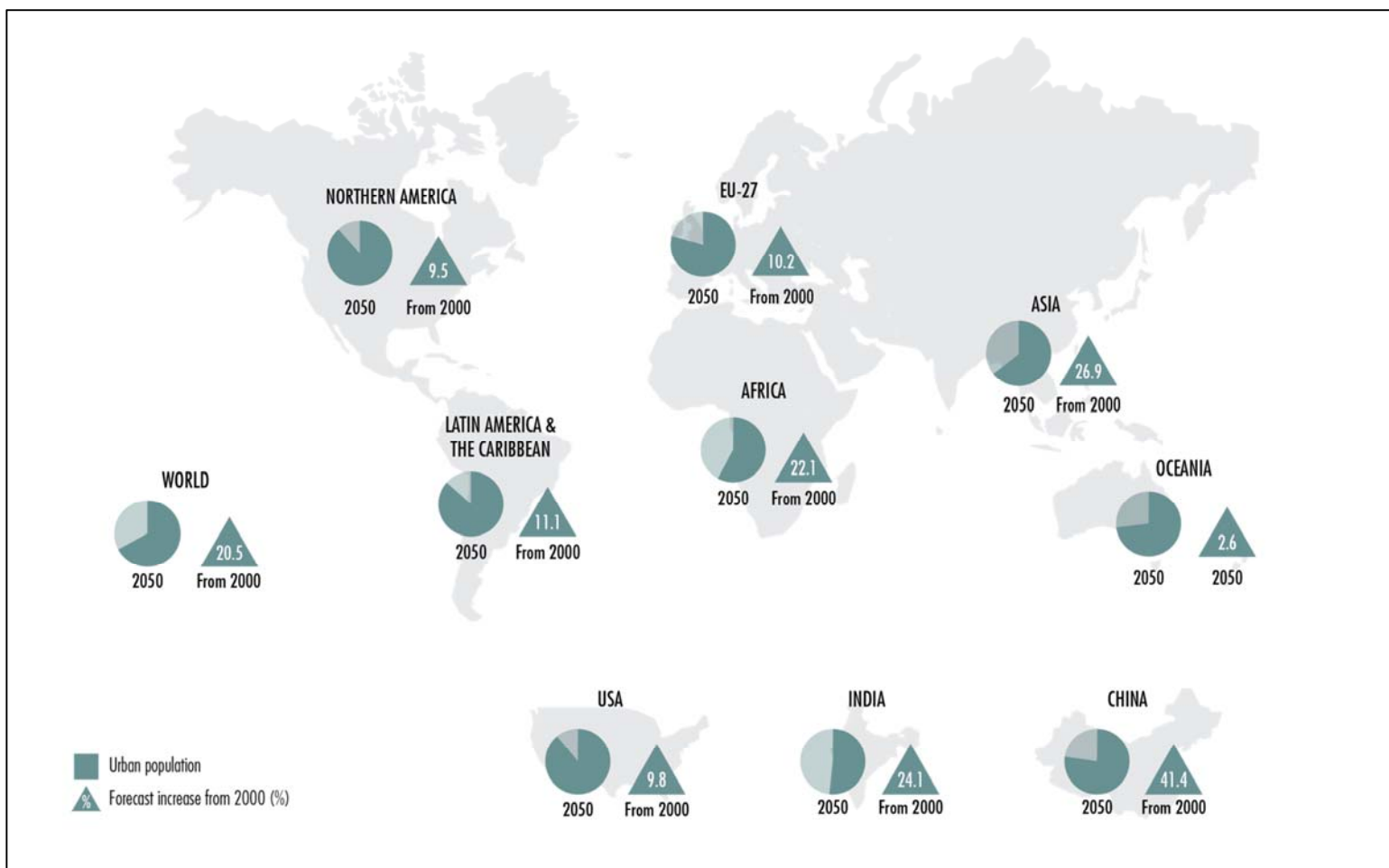
The long-term trend of urbanisation is expected to continue in the future globally, regardless of countries' income levels, as illustrated in Figures D.1.5 and D.1.6. Predictions suggest that by 2020 about half the world's population will live in cities, and over three hundred cities in the 'developing world' (middle-income and low-income countries) will have more than 1 million inhabitants (RICS Foundation et al. 2010). Despite forecasts focusing on the rise of 'megacities', some research suggest that about half of urban dwellers are likely to live in areas of fewer than 500,000 inhabitants (Cohen 2006; Ministry of Defence 2010). Experts also agree that most urban growth is currently characterised by an expansion in slums, informal settlements where living conditions are poor owing to insecure tenure, low access to sanitation and water, and low-quality housing (Birks 2007; Cohen 2003).

Figure D.1.5: Projected urban population by region, 2050



Source: UN, Department of Economic and Social Affairs, Population Division (2012). World Urbanisation Prospects: The 2011 Revision, POP/DB/WUP/Rev.2011/1/F5

Figure D.1.6: Forecasted proportion of urban to total population for selected world regions, 2050



Source: UN, Department of Economic and Social Affairs, Population Division (2012). World Urbanisation Prospects: The 2011 Revision, POP/DB/WUP/Rev.2011/1/F5

The main drivers of urbanisation are natural population growth and related population momentum (especially in Africa), the arrival of new migrants, and the expansion of urban areas through the annexation of surrounding areas – which itself goes hand in hand with the reclassification of rural villages in urban settlements (Cohen 2006). Experts in the Delphi exercise suggested that the modernisation of transport and globalisation of information may also facilitate movement to urban areas. Despite arguments that migration is likely to be the dominant factor driving urbanisation, research efforts attempting to break down the components of urban growth estimate that migration and the reclassification of rural areas as urban contribute to 40% of urban growth worldwide, while 60% of it may be attributed to natural population increase (or population momentum) in median countries (Thomas, 2008; Chen, Valente and Zlotnik, 1998).

In middle-income and low-income states, migration to urban centres is likely to take place at both an intra-border (i.e. rural–urban migration) and cross-border level (Ministry of Defence 2010). Some migration occurs chiefly for economic reasons, and is driven by the attractiveness of basic infrastructure (education and healthcare) as well as employment opportunities. It is facilitated by the increased ability to afford the costs of migration, particularly in Africa. Migration to cities may also be encouraged by local demographic pressures, stagnant local economies, political instability or war, and environmental issues such as climate change having a negative impact on agricultural productivity (African Development Bank 2011). In the developing world, it is possible that drivers for the rise of suburbanisation will include the middle classes leaving city centres to settle in peri-urban areas (Cohen 2006).

3.2. The relationship of urbanisation and international migration is less certain

While experts agree that urbanisation will continue to be a major driver of internal migration, there is more debate about its impact on international migration. The Delphi exercise showed strong uncertainty on this issue, with most experts deciding that there is a 50% likelihood that urbanisation will be a driver of international mobility. Current evidence shows examples where greater urbanisation coincided with greater international migration, particularly in some of the emerging economies.³ Greater urbanisation may lead to a growing supply of international migrants as more people gain skills and education as well as material resources and social networks that may enable them to move (Goldin, Cameron and Balarajan, 2011: 227). Increased capital flows to developing countries associated with urbanisation may help to create opportunities for potential migrants to increase their earnings and be able to afford to travel. Alternatively, in cases where urbanisation is taking place without sufficient economic growth and industrialisation – as is likely to happen in some African countries – people may be propelled to move internationally out of frustration with not finding sufficient employment in their home countries (African Development Bank 2011).

Alternatively, urbanisation may discourage international migration, either by redirecting migration flows or exacerbating unequal social structures. Estimates suggest that over three hundred cities in the

³ For instance, using China as an illustration, scholars conclude that ‘the primary sources of emigrants, instead, are some of the main destinations for peasants seeking their fortune in the city: Zhejiang, Fujian, the Guandong province. In other words, the same cities that are rapidly growing are also sending a growing supply of international migrants’ (Goldin et al. 2011: 227).

developing world (middle-income and low-income countries) will have more than 1 million inhabitants by 2020 (RICS Foundation et al. 2010). The rise of these urban concentrations in emerging economies may form new hubs that encourage their citizens to pursue opportunities from internal rather than international movement. In an alternative narrative, urbanisation may lead to greater inequality instead of potential development and prosperity, and may not have much impact on international migration. Almost 1 billion people are estimated to be living in slums, and this number is likely to double by 2030 (Castles & Miller 2009). While megacities may create mega opportunities, the mega slums that accompany this rise (Singh 2012) are likely to inflict forced immobility on large portions of the urban population.

Chapter 4. In Europe the attractiveness of migrants' receiving climate will help determine the future of international migration trends

Owing to its dependence on multiple interacting factors, the future of migration trends in Europe is difficult to forecast. Global evidence shows that while migration from developing to developed countries remains strong, there are signs that migration to Europe and the United States is decreasing, with uneven reductions across different countries (Development Research Centre on Migration 2009; OECD 2011c). Overall, European OECD countries experienced a 3% decline in permanent migration in 2010, excluding intra-European movement; by contrast, migration rose by over 10% to countries such as Canada, Korea and Mexico (OECD 2012i). Looking ahead, some experts argue that Europe may end up competing for migrants not only with other Western nations, but also with the emerging economies (see Fargues 2008). Experts noted that Asia may be a new locus of immigration in the next 20 years, owing to comparatively favourable policy regimes and cost of living. Expert interviews also suggest the possibility that the global pool of labour-abundant origin countries may decrease, further contributing to a shift in migration patterns.

Future migration trends to Europe will be driven largely by the development of other global regions. Expert interviews suggested that the national composition of migration flows and destinations may change substantially over the next 20 years, with countries such as Morocco, Egypt and Nigeria becoming potential destinations as sub-Saharan Africa continues to develop. Development transitions have been shown to lead to a short- to medium-term increase in outward migration, as more individuals gain the resources and aspirations for mobility (de Haas 2010). The migration choices of these newly empowered individuals will depend on their range of motivations, as explored earlier, including their economic potential. For example, while all economic migrants will be seeking employment opportunities, the choices of low-skilled workers may be restricted by countries' varying policy constraints. Delphi experts also suggested that due to their relative attractive migrant status, high-skilled workers may have more routes available and hence the ability to choose based on the atmosphere of destinations.

While global migration will continue, the direction and redirection of migrant flows will thus depend not only on migrants' motivations but also on the receiving climate of destinations. According to expert discussion in the Delphi, the EU is already far behind other developed countries in attracting and facilitating the migration of high-skilled workers. Although migration to Europe will undoubtedly continue in future years, it is unclear how changes in policy and political – such as the recent American reforms – may instead direct migration streams towards the United States, Canada or Australia. Interviews

with experts explain that development in emerging economies such as Brazil, Russia, India and China (the BRIC nations) is also creating new regional hubs that attract international migrant flows, which may have an impact on the type and scope of migrant flows to Europe.

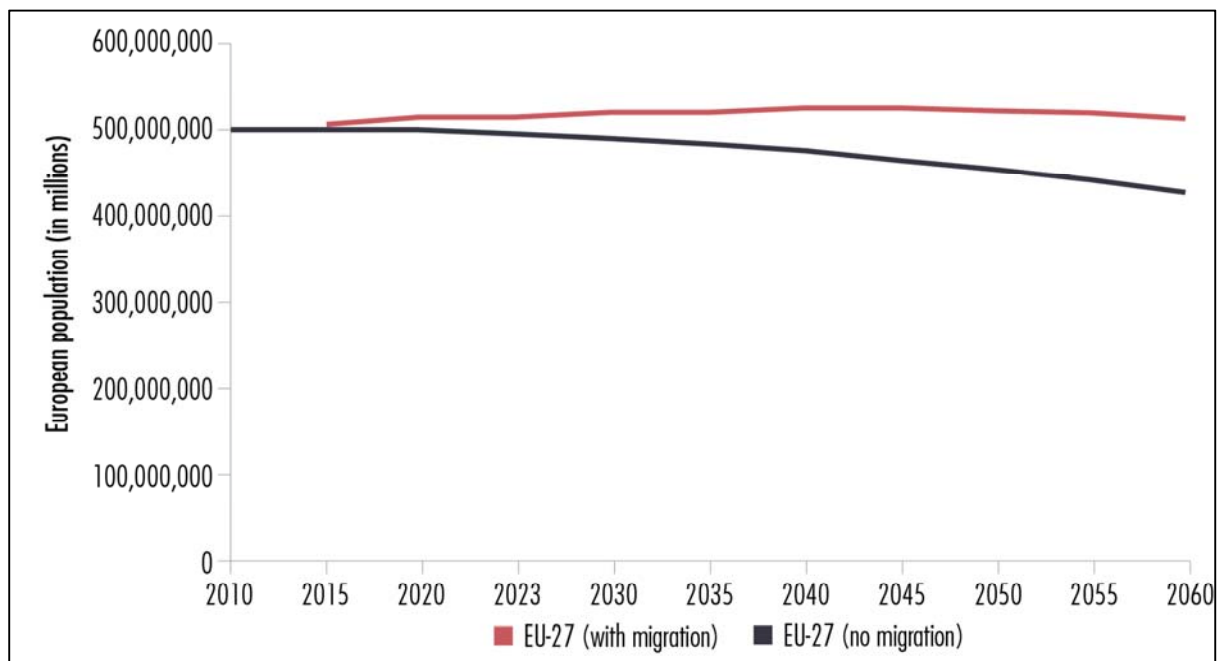
In predicting Europe's participation in the future distribution of migration flows, it is necessary to consider the interaction of a number of structural conditions: shifts in demography and related skills needs, economic conditions and integration climate.

4.1. Europe's changing demography will provide opportunities for migrants at multiple skill levels

It is projected that migration in the European Union will continue to play an important role, in large part owing to demographic projections. The youth bulge phenomenon in many parts of the developing world is creating conditions ripe for outward migration. By 2030, about 60% of cities' population is likely to comprise young people under the age of 18 (UN-HABITAT 2013). This phenomenon is particularly pronounced in the developing world, where population growth puts pressures on the labour market (Goldin, Cameron and Balarajan, 2011: 227). Where this population increase occurs without sufficient economic growth and industrialisation – as is likely to happen in some African countries – people may be propelled to move internationally out of frustration with not finding sufficient employment in their home countries (African Development Bank 2011). It is possible that a milestone is due to be reached around 2030–2035 as the percentage of the total population aged 15–24 (according to the UN's medium fertility scenario) will be high in both Africa and Asia around this period (UN 2012). Delphi expert discussion also suggested that owing to the influence of development and globalisation, youth from these areas may have higher expectations and aspirations than previous generations, leading them to seek opportunities through migration. Unrest in these regions of the world may lead to higher levels of migration towards Europe, which could present significant policy challenges for the EU.

At the same time, Europe is facing very different demographic trends, consisting of an ageing population and low fertility rate. As Figure D.1.7 shows, the European population is expected to decline gradually without inward migration. Over the next 20 years, the old-age dependency ratio – the percentage of individuals who have reached retirement age (women from 60, men from 65) to 1,000 individuals of working age – is predicted to increase from 25.9% to 38% (*DART* 2012: 10). As the rise in the elderly population creates a heightened demand for care services, the reduced European workforce creates an obvious niche to be filled by the surplus of workers from the developing world. However, demographic change will be uneven across Europe, varying regionally in its impact and speed (*DART* 2012). It is also highly important to avoid demographic determinism. Expert interviewees pointed out that there are strong examples of countries whose migration flows do not follow the obvious demographic trajectory, as in Eastern Europe (characterised by low birth rates and high out-migration) and the Gulf states (characterised by high birth rates and high in-migration). Demographic pressures should thus be considered alongside the other personal and structural forces that contribute to migration.

Figure D.1.7: Population projections in the EU-27 (with and without assumptions for migration levels)



Source: Eurostat (2012): EUROPOP2010 - Convergence scenario with and without migration

In assessing the labour needs resulting from Europe’s demographic trends, the skills breakdown of migrants is also uncertain. The shift in demographic conditions may cause demand for migrant workers to congregate in certain areas, reflecting for instance the need for care workers for elderly populations. With more women moving into the workforce, expert interviewees also predict a possible rise in the need for childcare workers. Migrant skills balance is likely to vary between European countries depending on their individual contexts. Expert discussion in the Delphi mentioned the case of Italy, for example, where there is an outflow of high-skilled workers due to lack of employment, while the ageing population is attracting inflows of low-skilled migrants.

The skills distribution of migrants to Europe may also depend on policy structures, which currently tend to favour high-skilled workers at the risk of excluding low-skilled migrants who will be needed to fill future labour gaps. In the long term, restrictive migration policies based on short-term economic factors or outlooks may have a negative impact on destination countries when the need for migrant labour increases (International Organization for Migration 2011a: 3–4).

While high-skilled workers in general will remain in demand, recent evidence points to the difficulties that some individual EU countries such as Germany are facing when trying to attract highly skilled immigrant workers (OECD 2013). In attempting to control the skill levels of migrants, policies may have the indirect effect of discouraging the migration of desirable migrants in high-skilled areas. Expert interviews suggest that there is a risk that this desirable global migrant elite will react to European policy barriers, either real or perceived, by gravitating towards comparatively welcoming regimes in the United States, Canada or Australia. This is already being discussed in the United Kingdom, for example, where efforts to crack down on visa abuses and reduce immigration numbers have caused public concern that student migrants are going elsewhere, costing the UK valuable skills (Mulley 2013). Furthermore,

interviewees point out that the development of areas such as Brazil, India, China and North Africa may create new destination countries for migrants.

4.2. Economic conditions will influence migrants' choices as well as their reception

Expert interviewees pointed out strong correlations between economic conditions and immigration levels. Looking ahead to future migration flows, it is therefore possible that the current economic recession may act as a deterrent to the volume and type. A recent study conducted by the McKinsey Global Institute argues that 'the financial crisis continues to have lingering and profound effects', pointing to a 60% decline in cross-border capital flows and a 3.7 trillion decline in cross-border claims by Eurozone banks since 2007 (McKinsey Global Institute 2013: 1). This slow-down in international capital flows may be mirrored by a corresponding decrease in human capital (Goldin, Cameron and Balarajan, 2011: 111). At the same time, the increasing attractiveness of the emerging economies, with factors that include economic growth and favourable conditions for people migrating to these countries, may help to redirect migration flows.

While protracted economic crises may have consequences for migration, there are high levels of uncertainty regarding the ways in which the economic crisis will unfold and its long-term implications. The impact of recession has been shown to vary widely between migrant groups, and the long-term effects of current financial conditions remain to be seen (Papademetriou, Sumption and Terrazas, 2010). Studies show that immigrants weigh benefits and costs in *both* their home and host countries when making mobility decisions, complicating the potential impacts of the European crisis. Czaika and Vothknecht's study on intra-European migration to Germany, for example, found that 'migrants, when deciding whether to return home, respond more strongly to economic prospects in their home than in their host country' (2012: 23).⁴ Additionally, economic growth from new areas such as the BRIC countries may act as a driver to redirect flows away from Europe. At the same time, the protracted economic crisis does not only influence the EU Member States but also many of the developing countries, even in cases when their financial systems are relatively insulated (Development Research Centre on Migration 2009).⁵

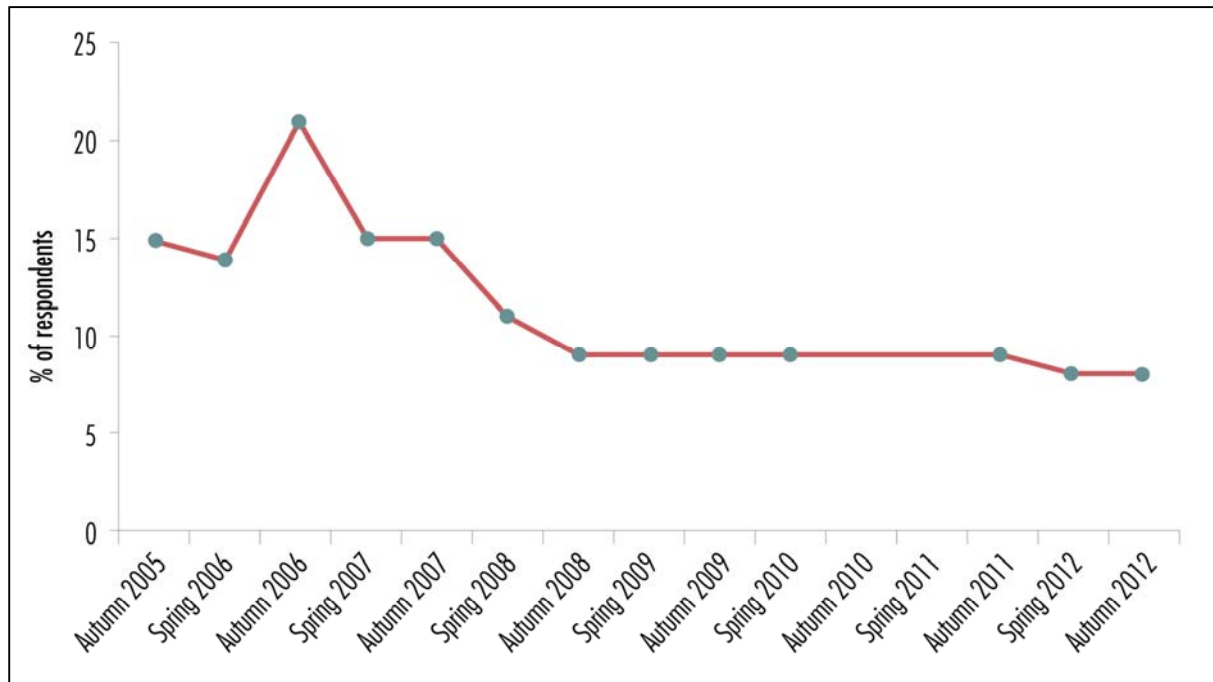
Non-economic impacts of recession on migration may be indirect and harder to determine. For example, continued economic downturn may have an impact on funding for integration programmes, although European Member States have so far been highly varied in their decisions about reallocating integration funding (Collett 2011). Experts in the Delphi exercise tended to agree that cuts to integration programmes are negative for migrant incorporation overall, with the average likelihood estimated at 74% in the final round of questioning. Some experts also agree that economic recession contributes to the rise of right-wing parties, which typically include nativist rhetoric as part of their political platform. However, data show a lack of support for the hypothesis that economic recession encourages anti-migrant hostility from native populations. The Eurobarometer survey, for instance, demonstrates that people's views on

⁴ The study is based on an analysis of annual and quarterly intra-European migration inflows to Germany between 2001 and 2010.

⁵ Many developing countries suffer from the secondary effects of the crisis, which include a steep fall in demand as well as reduced foreign direct assistance and aid (Development Research 2009).

immigration have remained relatively constant during the recession years (see Figure D.1.8). It is also worth noting that concerns about immigration remain lower than concerns about unemployment, which 50% of respondents listed as one of the most important issues facing their country in 2012.

Figure D.1.8: Immigration cited as the major concern on the national level in EU-27



Source: Percentage of respondents who listed immigration as the most important problem facing their country, based on Eurobarometer poll data (EU-27)

4.3. The climate of integration will contribute to both drivers and impacts of migration to Europe

In the future, integration policies will remain important in helping individuals of migrant background to contribute to and benefit from host countries. The effects of migration depend largely on the ability of migrants and their children to integrate into their new societies. Sociologically and psychologically, migration is a complex phenomenon that creates different challenges for migrants depending on such factors as age, gender, generation, language skills, employment opportunities and social connections with both receiving and origin communities (Bhugra 2004). Such factors may also contribute to migrants facing systemic disadvantages in accessing public services such as healthcare and welfare (UNDP 2009). Crucially, integration efforts must encompass not only migrants but also second-generation individuals of immigrant background, who may suffer from exclusion, marginalisation and discrimination (Ziolek-Skrzypczak 2013). Owing to these various challenges, according to the Eurofound report, ‘young people with an immigration background are 70% more likely to become NEET [not in employment, education or training] compared to others’ (2012: 3). Lack of integration has an impact not only migrants and their children, but also on their receiving communities, where tensions may arise because of a lack of social cohesion and mutual understanding.

Developing effective migrant integration programmes is challenging as ‘migrants’ cannot be considered as a homogenous group (Lindert et al. 2008). Expert interviews stressed that national structural policies, such as health and labour systems, are often just as important as targeted migrant programmes in facilitating the integration of migrants and their children. Economic downturn may also have discouraging consequences for integration, by creating a climate of high unemployment within which hostility towards individuals of migrant background is more likely to occur. Education has also been identified as an important enabler of integration, with language acquisition identified as a key component of successful initiatives. Scholars have recognised that ‘specific educational measures are needed, not only as an instrument for the inclusion of children of immigrants, but also for the promotion of social cohesion’ (de Haas, de Valk and Willekens, 2012). Protection of workers’ rights and recognition of international credentials are also important in ensuring migrants’ positive integration (UNDP 2009).

Improving routes to citizenship, which currently vary widely, is also an important priority in improving migrants’ political and civil rights, along with their accompanying sense of national belonging. There have been some positive developments in this area, with more European countries expanding rights to dual nationality and birthright citizenship, but greater efforts to support naturalisation would encourage migrants’ legal integration as well as their social integration (Niessen & Huddleston 2011). The underwhelming impact of the Blue Card Directive, intended to improve the intra-EU mobility rights of highly qualified migrants, highlights the centrality of national preferences in shaping these types of migration policies – and demonstrates that any future EU citizenship reforms will require buy-in from Member States (Cerna 2013).

In addition to helping determine the impact of migrants on receiving communities, successful integration is a factor informing the EU’s ability to remain attractive for international migrants. Migrants’ settlement decisions may be driven by perceptions of conducive integration conditions, such as common language, tolerant communities and economic support. This is particularly true for migrants with high levels of skill and education, who have greater choice in terms of migration destination. For these migrants, negative public opinion and discrimination from nationalist dynamics in European countries will discourage migration to the areas affected. The tone of media coverage, which varies between individual Member States, is one such dynamic that helps shape public attitudes which contribute to migrants’ integration climate (Fetzer 2011: 4). Expert interviewees point out that publicised anti-immigrant rhetoric in countries such as the UK, the Netherlands and Denmark may damage their future attractiveness for these top-tier migrants.

Across Europe, however, attitudes towards migrants remain highly mixed, and have remained relatively stable over the past few years. The 2011 Transatlantic Trends study showed that perceptions of immigration in five European countries (France, Germany, Italy, Spain and the UK) have held relatively steady since 2008, even through the Arab Spring (German Marshall Fund et al. 2011). For the five countries polled, 52% of respondents considered immigration as more of a problem than an opportunity; at the same time, 52% of European respondents also expressed optimism about the success of immigrant integration, with even higher support (65%) for integration of the second generation (German Marshall Fund et al. 2011).

Matrix for key trends in migration

Trend	Drivers	Indicators	Evidence-base (0/+/++/+++)	Time horizon	Outcomes for the EU	Uncertainty (low/medium/high)
Continued diversity in types and patterns of migration	Personal motivations; social networks; structural factors in both sending and receiving countries (economic opportunities, demography, policies, rights and liberties, integration climate, conflict, environmental conditions, etc.)	Migrant status (both legal and undocumented)	+++	Short and long term	Wide range of migrant types and routes; positively integrating diverse flows in European society?	Medium
Continued urbanisation across the globe	Economic opportunities in cities; modernisation of transport; population growth; annexation of rural areas into cities; involuntary conditions (war, environmental conditions, demographic pressure, etc.)	Urban population growth; urban population as percentage of overall population	++	Long term	Impact of migration on Europe's changing demographic balance; consequences for integration and available labour skills; urban lifestyles and diets contributing to global resource scarcity	Low
The attractiveness of migrants' receiving climate will help determine the future of international migration trends in Europe	Systemic policies (labour, health, etc.), openness of migration policies (both real and perceived); integration climate; economic conditions; employment opportunities	Migration flows to Europe as opposed to other major destinations (i.e. United States, Canada, Australia), particularly among high-skilled migrants with greater choice	++	Medium to long term	Supporting the 'right' types of migration, competing with other international destinations, accounting for short- and long-term considerations; skills gap; encouraging integration climates	Medium
Integration will be increasingly important, both for new migrants and second-generation communities	Attitudes towards migrants, policy structures in receiving country, labour market structure and conditions, education system, residential distribution of migrants	Unemployment rates, political rights, workforce participation and education levels as compared to native populations	+++	Short and long term	Integration and social acceptance of migration; attracting skilled migrants; improving the labour market and education outcomes of migrants and their children; discrimination and aggression against migrants; (perceived) well-being and livelihood of deprived neighbourhoods	Low

Trend	Drivers	Indicators	Evidence-base (0/+/++/+++)	Time horizon	Outcomes for the EU	Uncertainty (low/ medium/ high)
Relative number of migrants to the EU population will remain constant	Personal motivations; structural factors in both sending and receiving countries (economic opportunities, demography, policies, rights and liberties, integration climate, conflict, environmental conditions, etc.)	Migrant status (both legal and undocumented)	++	Short and long term	Impact of migration on Europe's changing demographic balance	Medium

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