

ICMPD Migration Outlook 2020

10 things to look out for in 2020

Origins, key events and priorities for Europe



Ten things to look out for in 2020

2020 will be another challenging year for EU migration policy. Below is a non-exhaustive list of trends and developments that will be high on the agenda of decision-makers and analysts alike.

1. The situation in main countries and regions of origin

Like in previous years, also in 2020 the migration situation in the wider European region will be shaped by developments in the conflict areas of the Near and Middle East and in African regions. In addition, the major displacement crisis in Latin America that has started to affect Europe in 2019 will continue to do so this year. For 2020, most geopolitical outlooks expect continued or growing instability in these regions. Consequently, there is no reason to believe that migration pressures towards Europe will decrease this year.

2. Irregular migration as the main theme of the European debate

Also in 2019, the migration debate in Europe was dominated primarily by issues surrounding irregular migration and asylum and this picture will not change this year. At the same time, the effects of demographic ageing are increasingly felt on European labour markets and employers have started to push for more openings on labour migration. European governments will face the challenge to make a clearer distinction between skilled and other types of migration and to communicate more clearly why the prior might be needed in the future.

3. Secondary movements towards Europe

2019 has seen an increase of irregular and asylum migration particularly of Afghan nationals towards Turkey and the EU. Thus, many of these migrants do not move out of their home country but from countries in the region hosting large refugee populations. Iran for instance hosts about 3 million Afghans whose economic situation worsened significantly due to the sanctions imposed on the country. The Turkish government's plan to establish a safe zone in Syria to resettle Syrian nationals might also prompt secondary movements to the EU. These trends will continue in 2020 and pose additional challenges for EU asylum and return policies.

4. The prospects of a peace process in Libya

The European migration situation always depends on the situation in Libya as a main point of departure for asylum seekers and irregular migrants from African countries but also from other regions headed towards Europe. The recently started peace process gives some hope to believe that the EU – Libya cooperation on migration control will hold also in 2020, limiting the number of departures to Europe via the Central Mediterranean Route.



5. The Eastern Mediterranean Migration Route as the main hotspot

Last year has seen a further shift of irregular migration routes towards the Eastern Mediterranean. Taking into account the situation in the main regions of origin of related flows and based on the assumption that cooperation agreements will hold at the Western and Central Mediterranean Routes, the Eastern Mediterranean Migration Route will be the main hotspot for migration management for the EU and its partners in 2020.

6. The migration situation in Turkey and Greece

Both countries have faced increasing pressures in 2019 linked to the large numbers of refugees and displaced they already hosted and the increasing numbers of refugees and migrants crossing their territories with the aim to reach the Northern and Western Member States of the EU. In 2020, the EU will have to provide the greatest possible support at all levels and by all means to the two countries in order to prevent an overburdening of Turkey and Greece and to preserve the EU – Turkey Statement.

7. Secondary movements within the EU

The movement of asylum seekers from the first Member State where they submitted their application to another Member States is a general problem for the European system. Last year saw a peak of applications of nationals from Latin American countries in the EU. Thus far, about 90 % of these applications were submitted in Spain. Given the bleak outlook in the Latin American countries of origin, forced migration from these countries to Europe is likely to continue. A saturation of the Spanish labour and housing market could prompt secondary movements of Latin American nationals to other EU Member States.

8. The new EU Pact on Migration and Asylum

The new Commission plans to present the outline of the new Pact for the European Summit in March. The Pact envisages an ambitious agenda, amongst others the development of a truly European Asylum System. Member States are, however, far apart on the issues of solidarity, burden sharing and a mechanism for the distribution of asylum seekers. It remains to be seen if the Commission can overcome the stalemate around these issues and bring Member States closer together again. If this difficult goal can be achieved, the Pact would start to show its real effects next year.

9. The German proposal on asylum screening at the external borders.

Germany has proposed an approach that could re-launch intra-EU cooperation on asylum issues and irregular migration. The idea is to screen asylum applications at the external borders, return inadmissible cases immediately and distribute the remaining applicants among Member States according to a yet to be agreed distribution key. Access to an asylum procedure and to social benefits should be available only in the responsible Member State.



When built up gradually, such a system could indeed incentivise EU cooperation and de-incentivise irregular arrivals. 2020 will show whether the plan gathers support by a sufficient number of Member States, goes beyond declarations of intent and includes credible commitments towards the Member States at the external borders.

10. Brexit and the status of EU and UK migrants

2020 will preserve the current status quo and the real change will come in 2021 when free movement should end for EU and UK citizens. Notwithstanding this, the post-Brexit status of these migrants might turn into a bargaining chip in the Brexit negotiations already this year and divide the EU Member states who attach different levels of significance to the issue. Thus, the new Commission might face some challenges to preserve unity among all Member States over the issue.

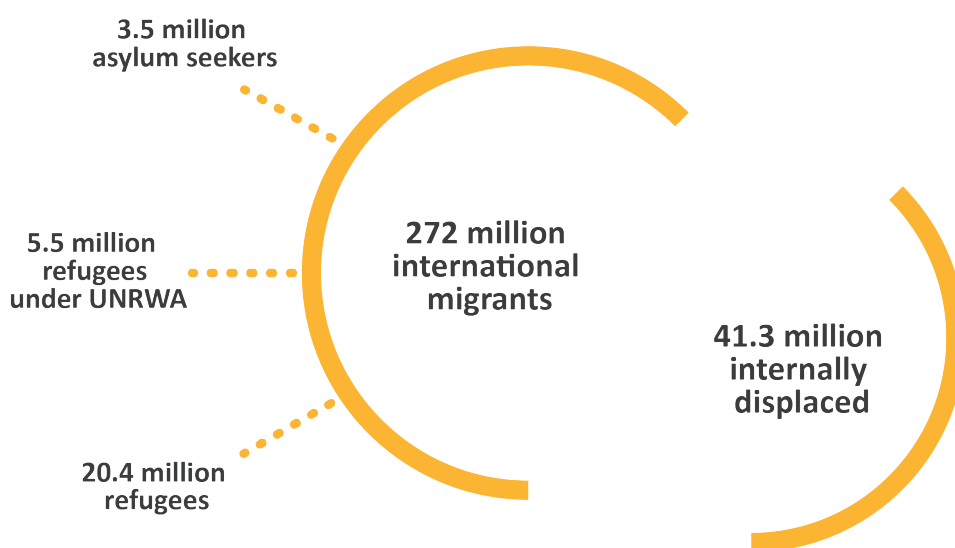


Introduction

ICMPD’s Migration Outlook presents a **brief analysis of migration and policy trends** and provides an outlook on developments and events to watch out for in 2020. Thus, the outlook does not claim to foretell the future or to cover all relevant trends. It wants to use past experience and highlight what might happen and is important to consider.

Size and direction of international migration flows depend on the **impact of a number of main drivers**. Those are war, civil war and conflict; the globalisation of economies, values and aspirations; changing technologies and means of communication; shifting demographics; socio-economic development, environmental factors and climate change. Together they form the global and long-term migration climate in which regional and short-term developments are embedded in. Available statistics confirm the increasing impact of these drivers. The latest estimates speak about **272 million international migrants** in 2019, representing 3.5% of the world’s population and an increase of 5.4% in comparison to 2017. The number of international migrants has grown faster than the world’s population. Mainly responsible for this growth is the global increase in conflict and violence. Between 1993 and 2018 the number of **globally displaced** more than tripled from **21.4 million** to **70.8 million**, the number of **internally displaced** increased by almost ten times from **4.2 million** to **41.3 million**. Internal conflicts lead to the largest numbers of displacement. In 2018, 57% of all refugees worldwide came from Syria, Afghanistan and South Sudan.

Global migration and displacement situation



Source: UNHCR



Migration hotspots in 2020

Like in previous years, the migration situation in the wider European region will be shaped by developments in the conflict areas of the Near and Middle East and in African regions. This does not imply that other world regions deserve less attention or cooperation, but any major and spontaneous migration movements in 2020 would be linked to the situation in these regions. The major displacement crisis in Latin America will affect Europe also in 2020. Due to the geographical distance related inflows might be significant but will not move in the quantitative dimensions of flows originating in the nearer neighbourhood.

Syria

Entering its ninth year of conflict, Syria remains the largest displacement crisis in the world. More than 12 million Syrians are displaced, 6.7 million are refugees, 3.7 million of them in Turkey. Over the last two years the Syrian government continued to consolidate control and in October the conflict parties started talks on a new constitution, but it is widely believed that also this attempt to end the conflict will not lead to a breakthrough. Syria is likely to experience new displacement also in 2020. In October, American forces withdrew from northern Syria and the Turkish government announced its plan to establish a safe zone where Syrian refugees can be resettled from Turkey. This plan might trigger secondary movements to the EU, albeit on a rather limited scale.

Afghanistan

With a total 2.7 million refugees, Afghans are the second largest refugee population in the world. Over 88% of these refugees are hosted by neighbouring Pakistan and the Islamic Republic of Iran. In Afghanistan both the security and economic situation have worsened in recent years and 2019 was no exception. The Taliban continued to make territorial gains and the peace process is halted. Civilian casualties reached the highest number in years and growing violence led to an increase in the total number of IDPs to 2.1 million, economic decline and even higher unemployment. In 2020, these developments will increase the potential of growing levels of flight and irregular migration from Afghanistan itself and secondary movements from Pakistan and Iran towards Turkey and the EU.

Iraq

Mass protests have put the government under severe pressure and analysts expect some concessions in the area of social welfare expansion in 2020. Notwithstanding this, there are 1.8 million IDPs and returnees in Iraq. In conjunction with the bleak economic prospects, they form a considerable potential for emigration. The US strike which killed Qassem Soleimani and an eventual American withdrawal are expected to have serious implications for the security situation. This might result in further displacement and onward migration to Turkey and Europe.

Iran

Approximately 2.5 million Afghans who have fled conflict and the bleak economy in their home country live in the Islamic Republic of Iran, which makes the country host to one of the largest and most protracted refugee populations worldwide. The sanctions against Iran have worsened the economic situation of this vulnerable group even more and led to secondary movements of Afghans



from Iran to Turkey and the EU. Even if political tensions ease, the economic situation will prompt attempts of Afghan nationals to leave Iran for Turkey and the EU. This situation is likely to constitute one of the main challenges for European migration policy in 2020.

Libya

Libya hosts a mixed migration population including refugees, labour migrants, IDPs and migrants in transit towards Europe. According to IOM there are app. 667,000 migrants in Libya, many of them with no income opportunities. The UNHCR counts app. 43,000 registered refugees and 217,000 returnees. 1.3 million people are in need of humanitarian assistance. Notwithstanding serious human rights concerns, the 2017 MoU between Libya and Italy, the 2017 Malta Declaration and the cooperation with the Libyan Coast Guard remain fundamental building blocks of EU attempts to control irregular migration. The offensive on Tripoli by the Libyan National Army (LNA) in April triggered the largest mobilisation of fighters since 2011. A military stalemate followed and peace talks started in 2020. Both sides to the conflict have agreed to participate in a UN ceasefire committee but are not yet willing to negotiate directly with one another. 2020 will see the early steps towards conflict resolution but all sides know that a successful outcome of the peace process is anything but certain. Should the conflict escalate it will result in even sharper rifts in the country, which would also jeopardize the cooperation with the EU on migration along the Central Mediterranean Route.

African countries

UNHCR reports 23 active refugee situations for Africa and a total of 6.3 million African refugees and 17.7 million IDPs. These situations are not only large in numbers, they also include refugee flows both from and to a country with large-scale internal displacement. Also in 2019, South Sudan remained the largest refugee situation. An estimated 2.2 million South Sudanese refugees have been displaced to Sudan, Uganda, Ethiopia, Kenya and the Democratic Republic of Congo, 1.8 million are considered internally displaced. There are 870,00 Somali refugees in the Horn of Africa and Yemen and 2.1 million IDPs in the country. With 905,000 persons, Ethiopia hosts the second largest refugee population in Africa. The Democratic Republic of Congo hosts 539,000 refugees but also records 4.5 million internally displaced. Sudan hosts 1.1 million refugees and 1.9 million IDPs, Nigeria records 1.9 million IDPs.

For 2020, geopolitical outlooks expect continued or growing instability for a number of African countries like DRC, Somalia, Burkina Faso, Mali, Niger, South Sudan, the Central African Republic and Burundi. Against this background and despite the fact that the share of African nationals among asylum seekers in Europe is below nationals from other regions like the Middle East, Asia and Europe itself, it can be expected that related trends will not decrease in 2020. A lot will depend on the situation in Libya as the main point of departure for African asylum seekers and irregular migrants headed towards Europe. The recently started peace process gives some hope to believe that the EU – Libya cooperation on migration control will hold also in 2020.



Latin America

Somewhat unnoticed by the European debate a displacement crisis evolved in Latin America that matches the crises in other world regions in size and urgency. Today, there are more than 12 million displaced, a doubling in comparison to 2013. Forced displacement in Latin America is not mainly caused by state persecution but by organised crime, food insecurity, state fragility and collapse of livelihoods. Traditionally, the U.S. were a safe haven for a small share of Latin American refugees but the strict immigration policies introduced by the Trump administration have limited this option. This also shifted flows towards the EU. Analysts do not expect that the tensions existing throughout the region will soften this year. It can be assumed that the numbers of displaced in Latin America will increase further and that migration along the recently developed pattern towards Europe will continue in 2020.

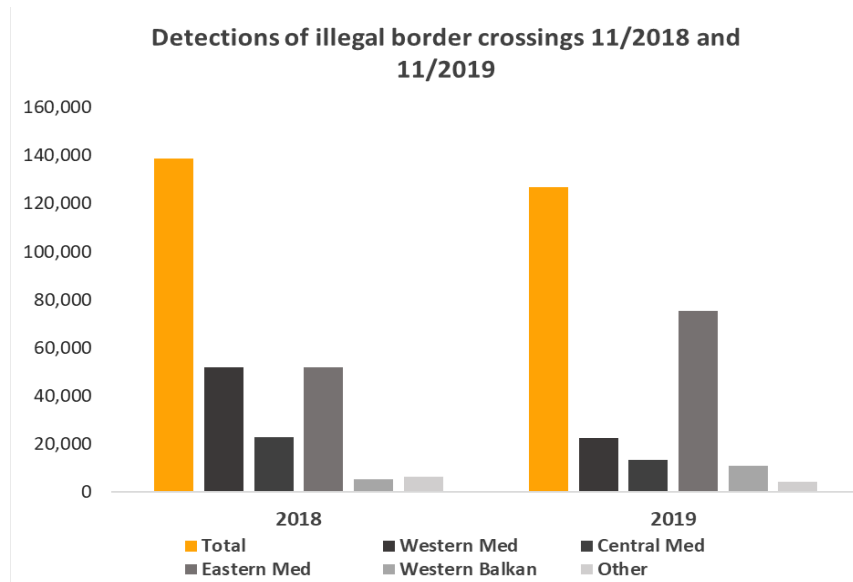
Migration trends in the EU

Also in 2019, the migration debate in Europe was dominated primarily by issues surrounding **irregular migration and asylum**. Two sets of indicators inform about related developments, the **detections of illegal border-crossings** and the total numbers of **asylum applications** submitted in the EU.

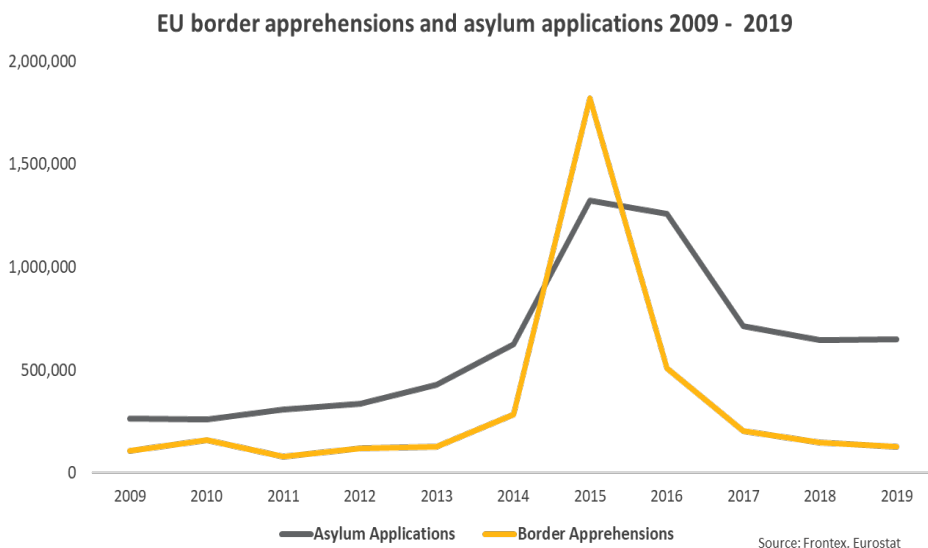
Irregular migration and asylum applications

In 2019 Frontex registered more than **139,000 illegal crossings** at the external borders of the EU. This implied a **decrease of 6% in comparison to 2018** and a decrease of 92% in comparison to the peak of 1.82 million illegal border crossings in 2015. The overall trend, however, did not reduce the pressure on all routes. In 2020, the detections shifted further away from the Central and Western Routes towards the **Eastern Mediterranean Route**. Here, the **number of detections increased by 46.0%** in comparison to 2018. Turkey. Notably, the trends in detections did not refer to all nationalities in similar ways. A break-down by nationality reveals that the **increase mainly refers to Afghan nationals** whose number of detections increased by **167.0%** while detections of all other nationalities decreased in 2019.

According to UNHCR at **total of 59,726 refugees and migrants arrived in Greece by sea in 2019**. The majority originated from Afghanistan (40%), Syria (27%) and the Democratic Republic of the Congo (7%). Currently about **40,000 refugees are hosted on the Greek islands** that are main entry points for irregular crossings along the Eastern Mediterranean Route.



The assumption of a structural shift in routes is also confirmed by statistics provided by the **Turkish authorities**. The Turkish coast guard reported a total of **46,000 apprehensions in the Aegean Sea** by mid October, a projected annual **increase of 90%** compared to the total number of apprehensions in 2018. Inside the country there was a 47% increase in apprehensions compared to 2018. Although much emphasis is put on the issue of Syrian refugees, the increase in irregular crossings and requests for asylum observed in Turkey and subsequently the EU has to be attributed mainly to Afghan nationals. 44 % of all apprehensions in Turkey referred to citizens from Afghanistan.



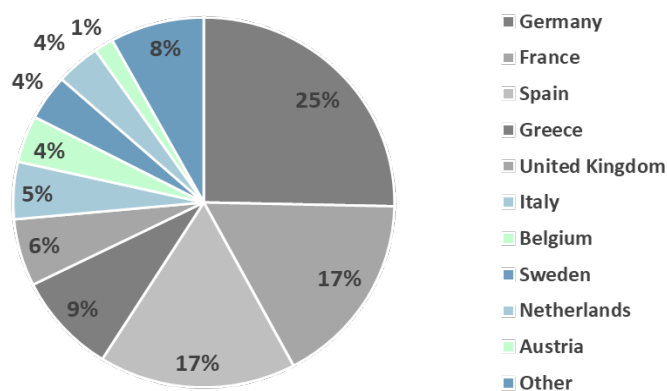


Application figures in the EU suggest that only a minority of asylum seekers have been previously registered as illegal arrivals at the EU’s external borders. This is in stark contrast to the situation at the peak of the refugee crisis but can be explained by two factors. First, irregular migration patterns have shifted away from sea routes, where arrivals are normally registered, to land routes, where this is less the case. Second, EU Member States impose stricter policies and increasingly emphasise the transfers to first countries of asylum in the EU. Consequently, asylum seekers try to avoid early registration before reaching their desired destinations.

Between **January and October 2019**, a **total of 546,725 asylum applications** were submitted in Member States of the European Union. This implied an **insignificant increase of 0.8%** in comparison to the first ten months in 2018. The same applies to first applications, where the increase was 1.0%. Final figures for the whole EU will be available in March and move in the margins of 2019 (app. 650,000 applications). Taking into account that a share of these applications meanwhile apply to children of persons who had arrived in the EU in previous years (Germany reports that 21.8% of all applications in 2019 refer to children born in Germany) and to cases of family reunification, one can assume a **further yet moderate reduction of newly arrived asylum applicants** in comparison to previous years.

This decrease would have been more distinct without the emergence of new patterns in 2019. The three most important countries of origin of asylum seekers throughout the last couple of years, **Afghanistan, Syria and Iraq, showed decreases in 2019**. At the same time, the **Latin American displacement crisis** started to have a significant impact on asylum applications in the EU. The total number of asylum applications submitted by **Colombian and Venezuelan** nationals increased by plus **176.2%** and plus **89.5%** respectively. Thus far, almost 90% asylum seekers from these two countries go to Spain. Latest figures show that Spain has received a total of 118,200 asylum applications in 2019. 96% of these applications were submitted by nationals from Latin America. Given the bleak prospects for the situation in Latin America it can be expected that this trend continues in 2020 and also results in increasing shares of **secondary movements from Spain to other EU Member States**.

Main destinations of asylum seekers in the EU 2019

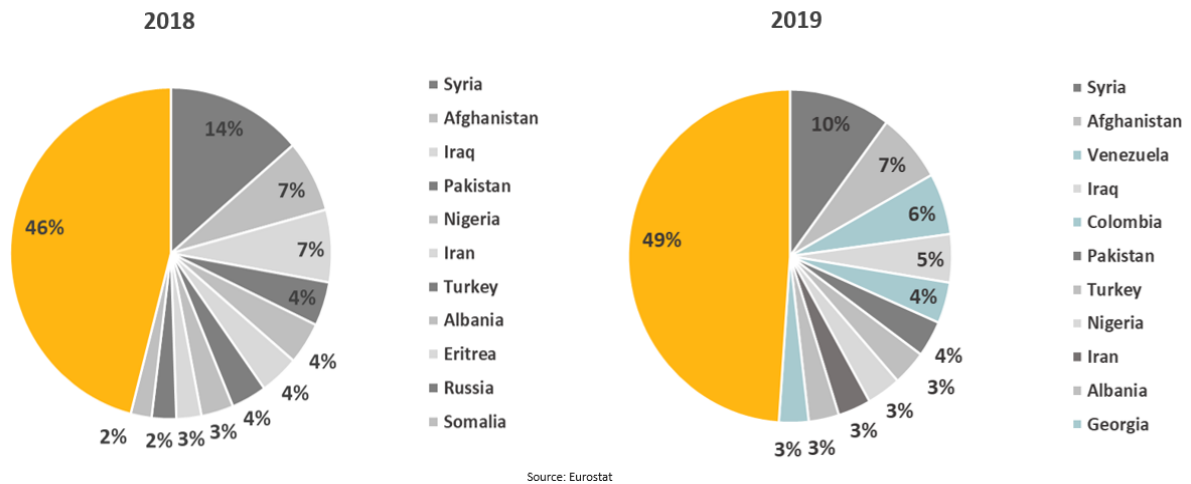


Source: Eurostat



Like in previous years, applications were concentrated in a small number of Member States. **74.7% of all asylum applications were submitted in just five EU Member States:** Germany (25.8%), France (17.2%), Spain (17.0%), Greece (8.9%) and the United Kingdom (6.0%).

Trends in annual asylum applications in the EU



Labour migration and Brexit

The European debate is dominated by the issues of irregular migration and protection and this picture will not change in 2020. At the same time it should not be forgotten that there is a second more hidden debate that in the long run will shape the European debate just as much. Europe is in the stage of **demographic and economic transformations which have a gradual yet continuous impact on the economic and political systems**. The long-term effects of demographic ageing are difficult to predict. For the next ten years, however, most assessments predict increasing skills shortages coupled with an increasing demand for skilled workers trained in MINT professions, but also in the craft and health sector, tourism or the restaurant trade. Emerging shortages are increasingly felt on European labour markets, which also increases the pressure on governments to consider openings in the area of labour migration from third countries. In 2020 Europe will see a continued public and political debate and European governments will face the challenge to make a clearer distinction between skilled and other types of migration and to communicate more clearly why it might be needed in the future.

On 9 January, the British Parliament agreed the **Brexit Withdrawal Bill**, implying that the UK will leave the European Union on 31 January. This date will also mark the beginning of a transition period until the end of the year which should define the future relationship between the UK and the EU.



As regards EU migration, the transition period will be a phase will be one of standstill preserving the current status quo. The real change will come in 2021 when free movement should end for UK and EU nationals. Notwithstanding this, the issue of post-Brexit migration will affect the EU already in 2020. It can be expected that the Eastern and Western Members of the EU attach different levels of importance to the issue, with the prior having large emigrant populations working in the UK. The post-Brexit status of EU workers in the UK might turn into a bargaining chip in the negotiations also over other issues like goods and services and cause additional divisions between EU Member States. This will also pose a challenge for the new Commission to ensure unity among the Member States over a migration topic, this time linked to legal and labour migration issues within the former EU 28.

Migration policy developments in the EU

2019 was a slow year regarding migration policy reforms in the EU due to persisting disagreements on the issues of solidarity and responsibility sharing and the European elections in May. The new Commission has made however clear that migration will be one of its absolute priorities. It called for a fresh start and proposed a **New Pact on Migration and Asylum**. Cornerstones are a relaunch of the Dublin reform, the development of a truly common European Asylum System, the reinforcement of Frontex, enhanced cooperation with countries hosting large refugee populations, the establishment of humanitarian corridors, the fight against human smugglers, resettlement, more pathways for legal migration, and a new approach to search and rescue. An overarching goal is to increase the EU-wide return rate, i.e. the number of third country nationals returning upon a leave order, which currently stands at 41.5%. Vice President Schinas announced that the outline of the Pact should be ready by the EU summit of 25-26 March.

One of the envisaged milestones has been reached already. In November 2019, the Council agreed to **reinforce the European Border and Coast Guard Frontex** and to provide the necessary funds. Frontex will have a standing corps of 10,000 border guards, a stronger mandate on returns and for closer cooperation with non-EU countries beyond the neighbourhood. There was also progress in the area of search and rescue. The Malta Declaration from September laid down the commitment of Germany, France, Italy and Malta to a temporary solidarity mechanism on voluntary basis.

In autumn, a **new initiative by the German Minister of the Interior** revived the debate. It proposes to conduct the screening of applications at the EU external borders based on a common set of rules. Depending on the screening, applicants should either be returned or directly distributed among Member States upon pre-defined responsibilities. Applicants should receive social assistance only in the responsible Member State. The idea of controlled centres at the external borders is not new and it remains to be seen whether the plans gather sufficient support and go beyond declarations of intent. In order to function, such a system will have to include binding commitments towards the Member States at the external borders who are exposed the most to irregular inflows.



Conclusions for 2020

The impact of the main drivers of international migration is not expected to decrease this year. Also for 2020, a migration outlook will have to assume that flight and displacement will continue to constitute a large or even increasing share among international migration flows. No major breakthrough can be expected in terms of the security and economic situation in the major regions and countries of origin of forced and irregular migration to the EU. Furthermore, the displacement crisis in Latin America worsens at a rapid pace and induces forced migration flows also to Europe.

Regarding the main routes towards Europe, a lot will depend on whether cooperation arrangements along the Central and Western Mediterranean Routes will hold in 2020. This can be assumed for the Western Route but is less predictable for the Central Route. However, should cooperation in the Central and Western Mediterranean hold, this will entail **continued or even increasing pressure on the Eastern Mediterranean Route**. Here, the combined sea and land routes make it more difficult to control movements than on the other Routes. In this regard, there is considerable **risk of an overburdening of Turkey and Greece** that would put the EU – Turkey Statement from 2016 under additional pressure. European Union support and relief for Turkey and Greece will be essential to avoid the creation of a breaking point in the overall system. Such a development could always result in a situation comparable to the 2015 crisis. In a best case scenario there will be a further but moderate decrease in asylum and irregular migration statistics. A worst case scenario, i.e. a systemic shock to the European system like in 2015, is not the most likely development but cannot be ruled out either.

Based on the declared intentions of the new Commission and Member States, 2020 will give a **new impetus to the debate on the reform of the Common European Asylum System**. Like in the past, the questions of solidarity and responsibility sharing and the future of the Dublin Regulation will be both centrepiece and main obstacle in this process. The Malta Declaration from September and the very recent proposals from Germany regarding a screening of asylum applications at the EU external borders raise some hope that things might start to move again after the standstill of 2018/2019. However, they also suggest that progress will be incremental and the trend towards different speeds and coalitions of the willing will continue. Thus, it is obvious that, if agreed in 2020, the New Pact on Migration and other initiatives will have their effects only in the following years.

In 2020, the EU and the Member States should follow **two parallel strands**. They should be prepared to **set measures that tackle short term developments** and **continue their mid- to long-term work on reforming the overall European system**.

They need to continue to focus on the support of countries hosting large refugee populations and populations of internally displaced. Main priority must be given to the **situation on the Eastern Mediterranean Route** and to support for Greece and Turkey as well as the upstream countries along the Western Balkans Route and in Africa.



The **long-term priorities for European migration policy**, also laid down in ICMPD's own recommendations on "Breaking Gridlocks", do not change in 2020: Renew a common vision on international protection, secure borders and safeguard Schengen, make return policies more effective, create proactive labour market policies, focus on immigrant integration, integrate the Western Balkan countries into Europe's migration system, invest in migration partnerships with partner countries, and apply a whole-of-migration-routes approach. The EU Member States should not miss the year to work on joint and function solutions for the reform of the European migration system. In a volatile migration environment, a failure in addressing weaknesses can backfire at any time.