

**Migration from the Maghreb and
migration pressures:
current situation and future prospects**

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Foreword

This report has been prepared by the Migration Branch of the ILO. The objectives of this Branch are 1) formulation, implementation and evaluation of international migration policies so as to meet the needs expressed by governments and employers' and workers' organizations, and 2) increased equality of opportunity and treatment in respect of migrants, as well as the protection of their rights and their dignity. The instruments at the disposal of the Branch are research, technical advice and co-operation, meetings, promotion and application of international labour standards. The Branch also ensures the collection, analysis and dissemination of relevant data, and provides a source of information for the Organization's constituents, the Office's technical services and any other interested parties.

Migration "pressure" is a term that became widespread in political debate and academic works towards the end of the eighties, initially in Western Europe. It applied to the growing number of non-nationals who, as migrant workers or refugees - one status, indeed, often disguising the other - tried to enter a territory and settle there at a time when the number of immigrants considered as acceptable had already been exceeded. The concept was ambiguous and could be interpreted at the discretion of the person using it - which is also reminiscent of the term "threshold of tolerance", also very popular in the early eighties. Be that as it may, migration pressure reflects a real, tangible fact, even though it is difficult to pin down and varies according to the observer, the country or the circumstances. This does not mean that migration "pressure" cannot or should not be scientifically dissected and measured. The social sciences would not be worthy of their name if they could not help us to understand a contemporary social phenomenon.

My colleague, Donatella Giubilaro, building on earlier ILO-sponsored studies¹, has now devised a classification of the emigration countries' population components - non-migrants, potential emigrants and effective emigrants - which has enabled her, to a considerable extent, to reduce the inherent variability of earlier definitions and so give an empirical formulation of *migrant pressure*. She illustrates her classification and its measures with data concerning the three countries of the Maghreb (Algeria, Tunisia and Morocco) and Turkey, and she establishes projections allowing her to evaluate the pressure that these countries are likely to engender during the period from 1995 to 2010. Her analytical and mathematical schema can apply perfectly well to other emigration countries for which a minimum data series is available.

This work also contains basic demographic and migration data concerning the Algerian, Moroccan, Tunisian and Turkish populations, which had never before been completely collected or collated.

The following study was funded by Italian co-operation, with a view to both promoting employment in the immigrants' countries of origin and to defining an analytical framework that will make it possible to determine trends in potential migration from North Africa. We are deeply grateful to the Italian Foreign Ministry for its financial support for the conduct of this study.

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¹ Böhning, W.R.; Schaeffer, P.V.; Straubhaar, Th.: *Migration pressure: What is it? What can one do about it?* (Geneva, ILO, 1991); and Bruni, M.; Venturini, A. : "Migrant pressure and propensity of emigrate: the case of the Mediterranean Basin", *International Labour Review* (Geneva), Vol. 134, No. 3, 1995, pp. 377-400.

1. Subject of this document and definition of the phenomenon to be analysed

1.1. Introduction

The increasing scale of migration worldwide in the latter years of this century has made this phenomenon one of the major problems facing governments. How can migrations be foreseen, modified, slowed down or halted? These are some of the questions to be asked, which ultimately amount to seeking to understand the phenomenon. The most prevalent point of view consists in regarding migration as a fluid movement and thus to consider it in terms of flows. The idea of flow quite naturally leads to the notion of pressure. But, for want of rigorous definition criteria, the term "migration pressure" has remained ambiguous up to now. There is an urgent need to define it more precisely. This is the purpose of this document, which attempts to define a model, by means of a dynamic study of migration pressure on the basis of an analysis of the situation in the countries of the Maghreb. The function of the model thus defined will be to allow a prospective study of potential migration flows, in this case, from the Maghreb in the direction of Europe.

Several stages will be necessary in arriving at a definition of this model. The first, dealt with in Chapter 2, consists of a reflection on the phenomenon of migration and includes the definition of terms relating to this phenomenon. An annex containing an analysis of the evolution of migration movements from the Maghreb countries towards Europe is included. In the second stage, which is the subject of Chapter 3, the macroeconomic determinants of migration pressure and the elements necessary for the formulation of hypotheses concerning the future evolution of these determinants are examined. In Chapter 4, we give an analytical content to the terms previously defined, on the basis of a model of labour market operations in terms of flow. The model can then be applied to the specific cases of the Maghreb countries and Turkey, on the basis of the macroeconomic determinants indicated by the study and the hypotheses concerning their future evolution. These hypotheses provide the basis for two migration pressure scenarios.

This paper combines theory with observation of socio-economic developments, in order to arrive at an interpretation of the factors that drive individuals to emigrate. Much has been written on the subject of North African migration to Europe, but the studies conducted have focused on assessing and observing these flows, as well as on policies concerning the integration of resident immigrants and the economic effects of their presence in the host country. They have rarely touched on the situation prevailing in the migrants' countries of origin. We still know very little about the reasons why part of the population is driven to leave while the majority remains at home. Unfortunately, empirical studies conducted up to now have not provided a basis for analysis or sufficient elements to interpret current behaviour patterns and make forecasts in respect of future migration pressure. In this study, we attempt to make such forecasts; however, in view of the number of determinants taken into account, and the quantitative and qualitative deficiencies of available statistics concerning the migrants' countries of origin, the forecasts will have only relative validity. The exercise will have to be considered as a tentative estimate.

1.2. Subject of this document

The purpose of this research project is to provide political decision-makers in both developing and industrialized countries with elements that may help them to understand actual and potential migration movements from the Maghreb, with their determinants and characteristics. At

the Maghreb level, these elements provide an analytical basis for the formulation of economic and social policies which directly or indirectly affect the migration phenomenon. At immigration country level, these elements could stimulate reflection on the impact of international relations and encourage the formulation of co-operation policies and programmes. This paper is also intended as a contribution to the current debate on the definition and scale of migration pressure, and to a deeper understanding of the problems associated with it. It was not until the industrialized countries realized that they could no longer control the migration phenomenon that the concept of migration pressure was developed, and this question, which has become a veritable political issue, was considered to be one of the most serious socio-economic problems of the latter years of this century.

The present crisis of policies in this domain and the major changes that these policies have undergone call for new elements of reflection in Europe. It is essential for this that European political decision-makers also take into consideration the point of view of the countries of departure, the long-term interests of these countries and the needs dictated by their development. At present, considerable effort is being expended on the establishment in Europe of an effective control system in respect of immigration from developing countries, especially from the countries of the Mediterranean Basin that are not members of the European Union. However, as things stand at the moment, the European countries are realizing that the formulation of a less "touchy" common policy as regards migration and asylum applications is essential but not sufficient, and that it must be accompanied by measures to influence the actual determinants of migration. Industrialized and developing countries will thus be induced to collaborate, not only in development programmes having a long-term effect on migration flows, but also in labour-market reorganization and employment-creation programmes, which may produce a more rapid impact on the propensity to emigrate.

The idea of associating migration with development is not new. But political decision-makers must be prevailed upon to give broader consideration to the impact on migration produced by measures taken in the context of international economic relations (Garson, Puymoyen, 1995). For this reason, we shall also examine the situation in the Maghreb countries in the context of the globalization of trade and the impact that this globalization could produce on migration pressure.

1.3. Economic migration

The flows that we shall discuss in this paper apply to migration for economic reasons. What we mean by this term is movements of persons who leave or consider leaving their own country voluntarily for socio-economic reasons with a view to working in another country. The analysis will also cover family reunification in so far as it is directly associated with economic flows. The migrants under consideration will be legal migrants, as far as possible, but also illegal migrants.

The study will not address the question of migrations motivated by factors beyond the personal decision of the individual: the problem of refugees and asylum seekers or other manifestations of forced displacement. Even if, in practice, it is not always easy to distinguish economic migrants from asylum seekers, the distinction is important at the conceptual level of the study, because the two phenomena are produced by different causes and require a different approach to migration pressure (Collinson, 1993). The question of asylum seekers will be addressed solely in so far as it may reflect disguised economic migration.

Even though we shall be dealing with migrations based on personal choice, we are fully aware that "economic" decisions are not made in a void, and that the socio-political environment plays a vital role in such decisions.

1.4. Flows from the Maghreb to Europe

The migration movements analysed in this paper are those that originate in the three countries of the Maghreb - Algeria, Morocco and Tunisia - and take the direction of the European countries. The study of migration pressure will also concern these three countries. However, in the case of Algeria, the relevance of our conclusions will be limited by the fact that demographic and labour market determinants have been outweighed by political problems.

Throughout this document, we shall establish comparisons with Turkey. We have chosen Turkey, not only because it is the country of departure that has produced the largest immigrant population in Europe, but also because it possesses a high Mediterranean migration potential, and its privileged relations with the European Union are to some extent identifiable with those of the Maghreb countries.

For Europe as a whole, we shall be referring to the European Union. By EU, we mean all 15 countries (Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, the Netherlands, Portugal, Spain, Sweden, the United Kingdom) that were members of the European Union at 31 December 1994. We shall analyse in particular the situation of countries at present host to a considerable North African and Turkish community: France, Belgium, Germany, the Netherlands, Italy and Spain. For certain statistics, we shall also refer to the European Economic Area (EEA).

As observation of international flows has shown, migration pressure is not generated by the least developed countries, but rather by countries that have already attained a certain level of economic development. The Maghreb countries are a typical example of this (Böhning). It is all the more important to understand the present flows in this region, because the countries in which they originate now want to participate in discussions on how to control them. Moreover, European countries, traditionally affected by migrations from the Maghreb, want to understand the conditions in which potential flows - which appear to be increasing while the reasons for the attraction of Europe, which were at the origin of these flows in the past, have disappeared - could be reduced in the medium and long term.

1.5. North African migrations in the international context

While focusing our attention on the phenomenon of migration from the Maghreb to the EU, we must relativize the volume of these migrations in proportion to all migrations worldwide. Migration from the Maghreb to Europe has little effect at global level, representing no more than about 2.5 per cent of the total number of migrants in the world (some 80 million). Generally speaking, total migrations - from all sources - towards Western Europe and North America account for only 30 per cent of the flows registered throughout the world. During the past twenty years, it has been economic migration between developing countries that has increased the most, and analysis has shown that, if the migration movement were to increase in the future, it would be directed above all to developing countries, especially to the countries of Asia.

While, in global terms, the volume of migrations to Europe from the countries of the Maghreb is not very considerable, it is still extremely important at regional level. From the European point of view, the phenomenon of migration from the Maghreb countries is significant in relation to the volume of the flows and the number of residents in Europe. EUROSTAT statistics (1994) reveal that, in 1992, the total flow in the direction of EEA countries - from all sources combined - represented 2.4 million persons. Of these, the immigration flows from countries other than those of the EEA amounted to 1.6 million, with immigrants from the Maghreb making up 4.6 per cent of the flows and 5 per cent of those coming from developing countries and countries where the economy was in transition.

In terms of stocks, the EEA countries, whose total population was 380 million in 1993, had at that time 7.6 million resident immigrants from developing countries, for the most part North

Africans, Turks, former Yugoslavs, Indians and Pakistanis, together representing 2 per cent of the total of residents. There were 2 million North Africans, representing 0.5 per cent of all residents but 26.3 per cent of those from developing countries. These figures refer only to legal and long-term immigrants and do not include illegal or seasonal immigrants. If we take into account the illegal immigrants, the maximum number of which - all origins combined - came to 2.6 million, including seasonal workers (Böhning, 1991), the role played by the North Africans is even more important, especially in Southern Europe.

For the Maghreb countries, European countries represent, in absolute terms, the principal outlet for their migration flows, as well as the principal place of residence of their expatriate population. Europe is the place of residence of over 90 per cent of Algerian and Moroccan expatriates, whereas a lower percentage - 82 per cent - reflects a greater diversification in the flows from Tunisia (Office des Tunisiens à l'étranger, 1994).

1.6. Position of the migrants' countries of origin

The authorities in the Maghreb countries have accepted the emigration of their workers, regarding this phenomenon as necessary and profitable. They assign it several objectives: to reduce the number of unemployed, to procure foreign currency in order to finance development, to enable migrants to acquire vocational training that will be useful on their return. The governments, which have always tried to supervise and control departures of migrants, thought of these flows as temporary, regulated and occurring within the context of a "migration chain", which also provided a structure for their community abroad. The legal framework of these flows was established by agreements signed in the sixties between the migrants' countries of origin and their host countries (Table 1).

These countries did not intend to lose their population for the benefit of European countries and were, therefore opposed to their emigrants' acquiring the nationality of the host country. The determination of the countries of origin to keep their "children" is reflected in the Algerian National Charter proclaimed in 1976, which declares the return of the emigrants to be one of the "major objectives of the Socialist revolution". Another example is the reluctance or opposition of the countries of origin in respect of encouraging political participation by their nationals in the host country. The King of Morocco, in an interview (Nouvel Observateur, 12-18 January 1989), stated that he was opposed to the granting of the right to vote to immigrants in France, even at local level, emphasizing the "Moroccan's fierce and persistent determination not to interfere in French internal affairs and not to fight the quarrels of the French". In his view, participation in elections in France was "in a sense, a betrayal of one's origins".

Return is still encouraged today by simplified administrative procedures and customs facilities. However, the attitude of the authorities in the Maghreb countries seems to be undergoing change, in substance if not in appearance. This attitude can be explained by persistent economic difficulties, which have induced them to accept, with a certain realism, the definitive departure of part of their population. The authorities intend to limit their influence on the emigrants to the preservation of cultural links. However, the policy of governments and specialized institutions is also aimed at preserving links with their nationals abroad in the hope of attracting their investments in the country of origin.

To preserve links with second and third generation emigrants of Tunisian origin, the Tunisian authorities are active in the socio-cultural field, through the Office for Tunisians Abroad (Office des Tunisiens à l'étranger), but also at legislative level. In fact, since 1992, Tunisian law permits a Tunisian woman married to a non-Tunisian to transmit her nationality to her children, provided that her husband consents. In the case of Morocco, the importance that government attaches to the question of Moroccan nationals abroad has been given concrete form by the establishment of a Ministry for Expatriate Moroccan Community Affairs.

The countries of the Maghreb, at any rate, consider that the alacrity with which certain European countries, especially France, Belgium and the Netherlands, grant nationality to a large number of immigrants and their children distorts the facts. What the migrants' countries of origin want to take into account at present is the "ethnic minority", which is always larger than the group of "foreign immigrants" included in the national statistics of the host countries. This "ethnic minority" should include not only those that have acquired the nationality of the host country, but also those who, as a result of the national laws of these countries, live there in an irregular situation.

The authorities in the Maghreb countries consider irregular emigration to be a problem that concerns the Europeans and not the emigrants' countries of origin, and that the latter can do nothing about it, since departures are, for the most part, facilitated by the issue of tourist visas by the European authorities. The North African countries have, in any case, signed agreements concerning the repatriation of their nationals who are in an irregular situation and agreed to carry out stricter controls on their coastal frontiers.

The Maghreb countries used to consider the emigration of their workers as a substantial contribution to labour market equilibrium in the countries of departure, and controlled emigration was an active employment policy instrument. Since the eighties, the role of migration has been challenged, and emigration is no longer part of that policy. None the less, the Maghreb countries do not want to halt migration but to improve it and adapt it to the requirements of the foreign labour market demand. In this context, governments are trying to encourage other countries to employ their workers, especially through bilateral agreements with the Gulf States, or triangular agreements - employment by European companies to carry out projects in the Gulf States or elsewhere. To this end, vocational training and an employment service structure have been established in Tunisia.

The countries of the Maghreb would also like to have a say in the control of new flows involving family members, and for this reason, under the terms of the recent free trade agreements between the European Union, Tunisia and Morocco (Table 1), they have expressed their hope that the question of family reunification should be discussed, in order to ease and improve conditions in this respect.

1.7. Position of migrants' host countries

Whereas, in the past two decades, the question of migration was considered as belonging to the sphere of bilateral relations, since the early eighties, various countries in the European Union, faced with common concerns, have adopted national policies converging towards similar positions (Table 1). These countries' governments initially considered it necessary to close national frontiers so as not to attract additional migrants and to succeed in their policy of integrating legal residents. The various regularization drives aimed at facilitating the integration of immigrants who had long been settled in the country. Once these policies were approved, the countries of the European Union considered that strict frontier checks would be enough to control all categories of migration flow. In this, however, they underestimated the factors that attracted existing migrant groups to the European labour market, factors that have given rise to the increase in irregular immigration flows. Thus, governments have deprived themselves of possible instruments to regularize and control these flows. In this way, they have themselves encouraged illegal immigration, which has not contributed to the integration of long-established immigrant communities and has also added to the feeling of vulnerability on the part of nationals.

Since the mid-eighties, in view of the failure of the various national immigration policies, the European Union has realized the need to harmonize and co-ordinate its policy in respect of

entry, residence and employment of foreigners. This co-ordination, based on informal talks, and subsequently on intergovernmental group conferences on specific questions in connection with migration, was difficult to establish and, today, harmonization of policy is still far from being an operational reality.

Since the control of migration flows through visas and frontier checks no longer appeared to be sufficient, the idea was advanced of embarking on a policy to prevent the situations that are the root cause of migration.

For this reason, since the eighties, the OECD countries as a whole have been advocating policies geared to economic development and employment creation assistance in countries with a high emigration potential. In fact, from the point of view of long-term reduction of incentives to emigrate or of producing an impact in the shorter term and trying to control the flows, observation of recent trends in respect of this migration phenomenon clearly shows that a policy of co-operation between countries should be established with a view to promoting economic growth and employment creation in the countries of departure. Such a policy would provide an alternative to escalating migration (Garson, Puymoyen, 1995).

Within the EU, the theory of sustainable development as a means of reducing migration pressure was strongly supported on the occasion of discussion concerning new agreements with third Mediterranean countries. Thus, in their relations with the latter, the European Union countries, especially the Southern European States decided to make a qualitative leap to which they were driven by political considerations. In fact, the Mediterranean countries adjacent to the Union represent both a potential if they develop and a threat if their economic situation deteriorates and political instability ensues. Bearing in mind these considerations, a global policy (political relations, development co-operation and trade liberalization) has been devised. The policy measures, accompanied by foreign investment incentives, are seen as elements in the prevention of migration. However, as we shall see in Chapter 3, the possible negative impact of these new agreements on the labour market and on economic development in the Maghreb have not been taken into account at political level.

1.8. Agreements between the European Union and the Maghreb countries

The oft-repeated assertion that the two parties, European and North African, must resolve the question of migration at political level, has so far remained in the realm of theory rather than practice.

The *Multilateral* co-operation agreements² of the seventies between the countries of the Maghreb and the European Community contained provision for a social aspect which established non-discrimination in respect of conditions of employment, remuneration and social security for North Africans working in countries of the Community. The fact that these *bilateral* agreements governing the relations of their emigrant nationals with the various immigration countries were considered to be more advantageous by the Maghreb countries has led to a neglect of the social component. However the European Court of Justice has taken these provisions into account in a number of its rulings. In view of the present attitude of the host countries, which give preference to unilateral decisions, the Maghreb countries are again considering the idea of a European protection system. It is to this factor that we can attribute the renewal of a certain, admittedly modest, interest in the social component in discussions on Mediterranean co-operation. Europe

² Co-operation agreements signed on 25, 26 and 27 April with Tunisia, Algeria and Morocco, respectively, and in effect since 1 January 1978 for Algeria and 1 November 1978 for Morocco and Tunisia; published in the Official Gazette of the European Communities L263, 264 and 265 of 27 September 1978.

is reacting with caution to these North African demands. While the new association agreements signed in 1995³ between the EU, Tunisia and Morocco - and agreements of the same type might be discussed in the near future with Algeria -, which have established a free-trade area, also include provisions concerning immigrant workers, the provisions in question are no different from those contained in earlier agreements. With a view to consolidating social co-operation, the new agreements have, however, given a certain priority to actions designed to reduce migration pressure, primarily through employment creation and the development of vocational training in emigration areas, as well as the re-integration of emigrants who have been repatriated because of their illegal situation in the EU.

But the European Union is aware that the international phenomenon of migration will have to be placed in a broader political perspective. To this end, under the terms of the new Euro-Mediterranean agreements concluded or envisaged with the countries of the Maghreb and the Mashrak, a regular political dialogue should be established between the parties, with a view to ensuring the stability and security of the Mediterranean region. This dialogue could entail regular bilateral consultation and co-operation on international questions of interest to both sides. While no specific field has been indicated, questions relating to migrations could well be treated in this context. Moreover, bearing in mind the strategic importance of the Mediterranean, the purpose of the project to form a "Euro-Mediterranean Partnership" by the year 2010, on which a preliminary conference was held in Barcelona in November 1995, is to strengthen relations between the States of that region through a co-ordinated global approach, in complementarity to the consolidation of bilateral relations. The problem of migrations, and in particular questions of migration pressure, integration of immigrants and illegal migrations, will be treated as priorities within the framework of the three aspects, political, economic and socio-cultural, of this partnership.

And yet, no free-trade agreement with the Maghreb or customs union with Turkey, which came into effect at the end of 1995, goes so far as to allow the free movement of persons between third Mediterranean countries and the EU. As for freedom of movement within the Union, it is restricted to nationals of Community countries, and immigrants legally residing in this territory may not move freely from one country to another. While the 1964 agreement of association between Turkey and the European Community contained provision whereby Turkish workers could move freely within Community territory from 1986, this provision has never been applied. In these circumstances, foreign nationals legally residing in a country of the European Union cannot benefit from the rule of Community priority in employment, in the sense that, if new manpower needs arise in a Community country, there is no rule whereby it must recruit among foreigners legally residing in another Member State. An absurd situation in a "single market" (Böhning, Werquin, 1990), there has already been one case of a State recruiting externally while the necessary workers were unemployed in other Member States.

If Turkey were to join the EU, the situation would change progressively, as has already happened in the case of Spain and Portugal. In this eventuality, which can be envisaged only in the long term, the supply of North African labour on the European market would suffer.

2. Migration analysed

³ Euro-Mediterranean agreement establishing an association of the European Communities and their Member States with Tunisia, COM (95) 235, final version. Euro-Mediterranean agreement establishing association of the European Communities and their Member States and Morocco.

2.1. Introduction

This chapter presents concepts relating to migration potential, migration propensity and migration pressure, terms frequently used in recent studies on the phenomenon of migration. Later, in Chapters 4 and 5, which concern a prospective study of migration pressure, we shall give a practical definition of these concepts, within the framework of a portrayal of the employment market and of migration pressure in terms of flow, so as to apply them to specific situations.

While one purpose of the preceding chapter was to show the relevance of this study in the present political context, we intend here to place it in the context of surveys conducted in this field and indicate its relevance as a contribution to the ongoing analytical debate on the new elements currently characterizing the phenomenon of migration.

2.2. Evolution of international conditions of migration

The international conditions of migration have changed to such an extent over the past thirty years that we can state that immigration is both an old and a new phenomenon. In fact, the migrations of before and after 1973-74 represent two distinct phases in flow trends. North African immigration took off during the sixties, in a context organized and governed by bilateral agreements between labour-exporting countries and host countries, which defined recruitment methods and provided for the establishment of joint consultation and co-operation structures. Up to the seventies, industrialized European countries that needed workers turned to countries with a surplus labour force to satisfy their internal demand.

The 1973 oil crisis marked a change in these immigration policies, and since then the frontiers of the traditional receiving countries have been closed to the Maghreb, and extremely selective policies have been adopted in respect of non-Europeans. This new attitude, which presented the manpower-exporting countries with a *fait accompli*, was reflected in a number of decisions taken unilaterally without preliminary consultation, such as incentives to return, revision of conditions of residence and family reunification, or the adoption of a policy of integration.

Since the eighties there has been a change in the economic and social situation of both labour-exporting and labour-importing countries, as well as in the relations between the various countries of the Mediterranean region, and this has the direct effect of changing the geography, economics and structure of international migrations, as we shall see in greater detail in the annex on migration movements. New destinations have been added to the traditional ones, and the whole of Western Europe, from Scandinavia to the Mediterranean countries, has become an area of attraction for migrants. New emigration areas have been added to or substituted for the earlier ones. The nature of the phenomenon has also undergone major changes. While waves of emigration used to consist mainly of young men on their own, now - a logical development in the older immigration countries - they consist of relatives joining the head of the family abroad. On the other hand, in countries newly affected by immigration, the characteristic phenomenon of men migrating on their own has reappeared. While flows of legally admitted workers are composed for the most part of top-level specialists, illegal immigrants now account for a very important proportion of total immigration. The new migrants, excluding illegals, are of urban origin and have a higher level of skills training than their predecessors.

As regards the North African communities living in Europe, their profile in the older immigration countries has modified. Foreign workers residing in these countries on a temporary basis have been succeeded by settled immigrants, the "reunited" family and younger generations, many of whom have never migrated. In countries newly confronted with the phenomenon of migration, the North African communities have also had to cope with their economic and social situation in countries that had no regulations or policy concerning immigrant populations.

2.3. The study in the context of an analysis of the migration phenomenon

With the passing of the century, the theory of migrations has become very complex. Migration models, fairly incomplete at the beginning, tried to take greater account of explanatory variables at individual and country level. Analyses based on macroeconomic or microeconomic approaches diverge because of the different explanatory elements considered as underlying migrations. At macroeconomic level, the analysis is of the social, demographic and economic phenomena that lead individuals to decide to leave. At microeconomic level, the analysis concerns the propensity of individuals to migrate from one country to another.

The subject of migration pressure is dealt with from different angles according to the authors, and this reflects widely diverging opinions on the interpretation, acceptance and significance of this phenomenon. Certain expressions relating to this concept are frequently used in writings on international migrations, without having been defined in advance. If the authors use the same expressions, implicitly giving them different meanings, it is because no precise definition of the phenomenon exists, even where several elements are used as signs of its manifestation.

Much of what is currently being written on migrations is devoted to reflections associated with government action. This research contains a certain amount of reflection on the part of potential migrant destination countries that want to curb immigration, and it focuses on means of limiting or controlling the flow. From the point of view of the host countries, there is the question of how to influence migration pressure at international level (Böhning, 1991), of the political implications of the phenomenon (Straubhaar, in Böhning, Schaeffer, Straubhaar, 1991), of how to help migrants to stay at home (Böhning, 1994), on the consequences of the liberalization of the international economy (Weintraub, Stolp, 1987) and of what could provide alternative solutions to migration (OECD, 1993a and 1994).

In certain studies (Tapinos, in Tapinos, Keely, 1996), the very concept of migration pressure is brought up for discussion with a view to giving it a political rather than analytical meaning, thus reflecting only the concern of the host country. Their conclusion is that the concept is, by nature, not measurable.

On the other hand, in other studies on migration pressure, the term is defined so as to present an analytical explanation and thus an attempt at measuring the phenomenon, even though, in the matter of the conceptualization and macro and micro-economic determinants of this phenomenon, analyses differ markedly according to author. In Böhning (1994), we find an analysis of the phenomenon which distinguishes between pressure in respect of emigration and immigration, which can be explained as the consequence of gaps in income per inhabitant between countries or gaps between international trade levels. Schaeffer (in Böhning, Schaeffer, Straubhaar, 1991) attempts to give the term "migration pressure" a more precise definition based on a market approach and expressed in terms of demand for opportunities to move to another country. This approach is used to discuss the link between economic factors and migration pressure. Straubhaar (in Böhning, Schaeffer, Straubhaar, 1991) proposes an analytical definition of the phenomenon on the basis of potential emigration and of immigration demand, for which recourse is had to the utility function of an individual considering emigration, and which aims at obtaining a means of measuring migration pressure and applying it to a specific case. Kultalahti (1994) analyses the macro and micro-economic factors that influence migration pressure. In Bruni and Venturini (1995), the definition, based on the surplus labour supply in the emigration countries, leads, according to a macro-economic approach, to the evaluation of phenomena associated with migration pressure.

In the writings of Bruni (1988) and Bruni and Franciosi (1981) the portrayal of the labour market as a flow model has allowed an analysis of possible imbalances in this market. The extension of this model to an open economy (Bruni, Venturini, 1995) leads to a dynamic definition of concepts associated with migrations and migration pressure. On the basis of these definitions,

it is possible to analyse the effect of labour market imbalances in an open economy on the phenomenon of migration, by focusing on its demographic aspect.

For our analysis of migration pressure in respect of the Maghreb, we have chosen to use the macro-economic approach developed by Bruni and Venturini (1995), which allows us to concentrate on the situation in the countries of departure. This method places more emphasis on the impact of demography on the supply of labour and the possible imbalances in the labour market. The fact of emphasizing the influence of population growth, which has been reliably estimated for the next 15 years, enables us to formulate hypotheses up to 2010 and to present scenarios of high and low migration pressure. For the relatively long period from 1995 to 2010, these hypotheses and their impact on the labour market are therefore more easily acceptable than economic hypotheses, the effects of which would be very short-term. The application of this model to the Maghreb and Turkey may provide an estimate of the evolution of this phenomenon and make it possible to establish projections, which will, of course, be subject to the uncertainties of variations in the demand for labour and other factors with short-term impact. In this study, which is thus another attempt at measuring migration pressure, we shall also have to take into account the limited applicability of certain concepts to the model itself.

2.4. The extent of migration pressure

While the actual definition of migration pressure raises a problem, it is practically impossible to measure it directly. The question arises of how to gauge this pressure in general, from one country to another, and in particular according to the different causes of and motives for departure.

We cannot measure directly the number of potential emigrants who have the means to carry out their intentions. Neither can we measure the number of persons who have made unsuccessful attempts to leave, any more than we can include in such data nationals in an irregular situation in another country. We might infer an initial estimate from the number of specific applications made by would-be emigrants. Several information sources can be used in the country of residence or in the immigration countries. Among others, we might mention requests submitted to foreign recruiting agents, petitions for family reunification and applications for training courses abroad. On the other hand, we can consider migration pressure in relation to three categories of individuals: those who have work in their own country but give it up in order to emigrate, those with no work, who wish to emigrate and have the means to do so; and, finally, those in an irregular situation in a host country. In the present case, we cannot directly evaluate the first two categories of individuals, as they are not included in any statistics.

In the two cases mentioned, the extent of the flow of illegal immigrants is unfortunately impossible to establish. The number of foreigners in an irregular situation which can be estimated thanks to data available in the host countries but varies considerably according to the statistical sources, is a very unreliable indicator of the phenomenon. What we can measure by observing the current flows of legal emigrants is the scale of demand for immigration by the host countries and not migration pressure (Straubhaar, in Böhning, Schaeffer, Straubhaar, 1991). However, the estimate of all actual flows of migrant workers, legal and illegal, who leave their country for a longer or shorter period, could provide us, none the less, with an indirect estimate of migration pressure.

As regards the various factors and their effects on migration pressure, it can be difficult to anticipate their importance. The demographic factor has a bearing on the long term and is fairly easy to measure, given that tomorrow's working population is already born, and that we can therefore forecast the future increase (up to 20 or 30 years) in the economically active population from the present birth rate. On the other hand, the influence of the economic situation, which has

its effects in the short term, is more difficult to assess and forecast. Socio-political changes can also have their effects, and in the very short term.

Proceeding from these considerations and the attempts at direct measurement of migration pressure made in the past by other authors, we managed to finalize the model used in this study and to apply it to the Maghreb region. The grey areas still existing in respect of the use of expressions associated with migration pressure leads us to try to clarify, in this chapter, some of the expressions that have cropped up frequently in recent literature on the subject. To attain the objective of this study - an analysis of migration pressure in a region of the Mediterranean Basin - we must present our interpretation in such a way as to establish an analytical formulation of these concepts in the chapter on the prospective analysis of migration pressure.

2.5. International migrant supply and demand

Among the changes that have occurred in the international conditions of migrations we can include the factors determining international migrant supply and demand and their perception in European public opinion. The departure of North African workers for the European labour market, French or Belgian, during the sixties and early seventies, corresponded to a demand for manpower that could not be met within the national territory. With the changes in international conditions, these flows have not halted, but European public opinion became aware that their causes had changed. While, on the one hand, the demand for immigrant workers was rapidly declining under the pressure of the economic crisis, the number of individuals wanting to emigrate was rapidly increasing to the extent of exceeding the demand. The migration phenomenon was thus no longer actuated by demand but rather by supply: migration flows were no longer primarily generated by the requirements of the industrialized economies, but by the strategy of individuals in search of a better life (Böhning, 1994). The workers were not responding to an exogenous demand but reacting to an endogenous push factor in their own countries. The supply of migrants began to be seen as "infinitely elastic", since international economic factors, imbalances in incomes and employment opportunities, contributed on their own to fuelling an "unlimited supply of labour" on an international scale.

In terms of "push/pull", that is to say repulsion on the part of the migrants' country of origin (*push*) and attraction on the part of the host countries (*pull*), the equilibrium between the factors seems to have shifted towards the countries of origin. The push factors, or pressure to depart, have become more decisive than the pull factors attracting migrants to the host countries. In view of these changes and the present awareness of the push factors existing in the countries of origin, we have decided in our analysis to adopt a macroeconomic approach focused on the situation in the countries of origin.

2.5.1. Potential emigration

The fact that the number of potential emigrants exceeds the demand for expatriate workers gives rise to a potential emigration within a country. This potential emigration over a given period of time, is composed of persons wishing to emigrate, having the means, especially the financial means, to do so, and who have successfully or unsuccessfully taken the appropriate measures with a view to leaving their country to engage in economic activity abroad.⁴

⁴ See also Chapters, 4.2.4., 4.6.2. and 5.2.1.

For potential emigration to develop, the macro-economic push factors existing within the country must be accompanied by a propensity to emigrate (E) at micro-economic level, that is to say the individuals' inclination to emigrate.⁵

Potential emigration is a dynamic phenomenon, any study of which must take into account the impact of the factors that brought it into being. An analysis of these factors should be accompanied by an analysis of the population as a whole, if we are to understand why only a part of the population wants to leave while another part does not, even though it is subject to the same factors and has the financial means.

In the section of this work devoted to a prospective study of migration pressure in terms of flow, we shall measure migration potential (MP) as the surplus workforce in relation to national needs, given a closed economy. This migration potential does not necessarily correspond to the active population in search of employment.

At a global level, the number of potential candidates for international mobility is vastly greater than the number of individuals that States are prepared to admit (legally), and this generates migration pressure.

2.5.2. Effective migration

Persons who have successfully completed the procedures for emigration, and who consequently have migrated legally, as well as persons who emigrate illegally, represent the effective migration of workers (EM) and their families from one country to another. This migration is thus composed of legal migrant workers and their families, as well as those who settle in a country to work without having gone through the requisite legal procedures.⁶

Despite the European closed-frontier policy, migration is an incontestable reality, since there is net immigration from the Maghreb countries to Europe. While the immigration countries react to the scale of the phenomenon by increasingly limiting access, this policy is to a large extent illusory. In fact, not counting persons in an irregular situation, the majority of legal flows cannot be reduced, however strict the frontier controls, because the states respect the right to family reunification or respond to structural or sectoral manpower shortages in the European market.

As regards illegal immigration, the EU and, above all, the southern countries of the Union will no doubt eventually further limit this phenomenon through common security policies, but that will not entirely deter persons who are determined to emigrate clandestinely. Moreover, in democratic countries, surveillance of frontiers and of the resident population can never be so strict as to prevent all irregular immigration or residence (North 1993).

2.5.3. Migration pressure

Pressure to emigrate from one country to another applies, at a certain point, to two population groups: the category of persons who want to leave the country and nationals who are in an irregular situation abroad.⁷ These two groups consist of persons whom the authorities in the immigration countries do not want living in their territory.

The first group consists of all individuals residing in their country of origin, who have considered emigrating, have expressed that intention, but who have not been successful in their

⁵ See also Chapters 4.2.7., 4.6.5. and 5.2.3..

⁶ See also chapter 4.2.6.

⁷ See also Chapters 4.2.10., 5.1.6. and 5.2.4.

endeavour. Those who belong to this category are those who have expressed their intention to emigrate by taking the appropriate steps, and for whom the only obstacle lies in the restrictions imposed by the destination country. We should place ourselves in a sufficiently broad perspective but exclude from this definition persons who cannot realize their ambition to emigrate, for want of information, family or other support, or financial resources to cover official formalities, transport and accommodation. We should also exclude all residents who would like to leave, who have the means to do so, but who do not carry out their plan because they realize that they cannot emigrate legally and will not accept the idea of being in an irregular situation. However, if the socio-political environment were to deteriorate, or if the economic push and pull factors were to change, these persons might promptly reconsider their situation.

The second group consists of all individuals illegally residing in a foreign country. This group comprises, on the one hand, those who hope to regularize their situation in the country of residence and, on the other, those who see no need to be regularized or wish to retain their illegal status in order to enjoy the economic advantages that this status gives them on the labour market.

In the section of this work devoted to a prospective study of migration pressure in terms of flow, we shall measure the potential migration pressure in respect of workers as being the migration pressure in the country, less the number of workers who have legally entered a foreign labour market during the period under review.

Any modification of conditions in the arrival and departure regions leads to variations in the number and characteristics of would-be emigrants. By definition, external emigration pressure is the result not only of the migration potential but also of the extent to which frontiers are closed to regular migration flows. European countries which want to regulate entries onto their labour market according to their policies, interests and needs, create obstacles to freedom of movement and are thus at the root of this pressure. The very term "migration pressure" implies that migration flows could develop rapidly if there were no barriers to curb this pressure (Schaeffer, in Böhning, Schaeffer, Straubhaar, 1991).

2.6. Statistical data

We distinguish two sources of data: the institutions of the European countries that admit migrants and those of the countries of the Maghreb from which migrants depart. We have basically used European sources, unless otherwise indicated. In the case of the host countries, general data collected on migration flows help us to understand the characteristics of the phenomenon and the issues at stake. In fact, the problem for Europe is not really that of a shortage of data, even if the data are considered not very satisfactory for the most part, statements are lacking from countries recently affected by this phenomenon, and illegal immigrants are not included in the statistics. The question is rather that of applying a generally accepted method of data collection and use the same definitions of migrant categories and characteristics. OECD and EUROSTAT surveys conducted in collaboration with the Member States of the two organizations, endeavour to produce, organize and disseminate comparable statistical data.

Access to comparable statistical data is particularly important in enabling European countries to conduct joint or transversal research projects. These countries have, in fact, considerable need today of thematically based strategic studies that can establish the link between raw data and researchers' analyses, on the one hand, and the work of national authorities responsible for employment and immigration, on the other. These studies are necessary in order to support decisions and the formulation of strategies adapted to given circumstances in the national or European context.

As regards the countries of origin, the difficulty lies in data production and the deficiencies of national institutions in respect of the observation and study of the phenomenon. Data supplied by existing sources do not make it possible to capture the situation of migration flows and the

issues at stake for the countries of departure. The situation is further complicated by the fact that, while these countries use statistical data produced by the host countries, they apply different standards to the same immigrant population to determine their nationality. Thus, Moroccans who have obtained French naturalized status are still considered to be Moroccans by their country of origin.

3. Macro-economic determinants of migration pressure

3.1. Introduction

In this chapter, we shall examine the determinants of migration pressure and present essential elements for the formulation of hypotheses concerning their future development. These determinants and the hypotheses in respect of their future development will enable us to put the model into operation and apply it to specific cases, and subsequently to produce two scenarios of migration pressure.

It is not possible to base forecasts concerning the nature and extent of future migration pressure on a global theory that takes all factors that influence this pressure into account. We shall use elements of theory and conceptual models already established at macro-economic level in the migrants' countries of departure, and this will provide us with indications which will have to be taken into consideration in our study.

At international level in general, a migration potential of an economic nature develops among a number of countries, when these countries present different levels of development. Where this imbalance is accompanied by pull and push factors influencing individuals by inciting them to migrate, or if it engenders such factors, it will produce would-be emigrants. The main push factors are limited job prospects or low wages in the country of origin, whereas the pull factors include the possibility of higher wages and greater employment opportunities in the destination countries.

If we consider only the push factors existing within a country, the phenomenon of migration pressure is the result of the interaction of demographic and economic dynamics and social determinants that influence individual choice. We shall confine ourselves in this study to determinants produced at macro-economic level, knowing that the propensity to emigrate of individuals, while not specifically analysed, is considered as a necessary and fundamental element of migration pressure.

Population growth will be examined in the context of its impact on the economy and the utilization of a country's financial resources. We consider that the heavy pressure that population growth brings to bear on the employment market determines the increase in the imbalance between labour supply and demand on the national market. Theoretically, this imbalance could be rectified by influencing demand through the creation of additional jobs. However, the number of jobs and the level of economic performance necessary in order to balance total supply, would have to be so high that it is impossible to envisage them in the short term.

In Chapter 4, where we apply the model in terms of flow, we shall consider the supply of labour in the Maghreb countries and Turkey, in order to establish the extent to which labour supply in relation to national demand has an impact on the development of migration potential.

Labour supply and its evolution are not determined solely by the demographic component, but also by the rate of participation of the population in economic activities. This latter affects the total increase in the supply of labour and its composition.

In view of the fact that population growth has long-term repercussions on the number of jobseekers, its impact on the coming decades is relatively easy to establish. The effects of variations in participation levels - especially women's participation - and the economic and social effects that determine the demand for labour are more difficult to evaluate and may have an impact in the short term.

We shall also examine the economic development of the above-mentioned countries and the effects that trade liberalization policies may have on employment. Given the complex nature of the connection between development and migration, while economic changes may lead in the long term to a decrease in migration pressure, in the short term the marginal effects of this process may encourage or facilitate emigration and, in various ways, affect the scale, direction and composition of flows. These elements also interact with the instability of the political and social environment, and with the disruption of the natural environment. This interaction can also produce a direct or indirect effect on migration pressure.

Throughout our entire study, and faced with the magnitude of the migration issue, we must never assume that the population will necessarily want to emigrate once all the causes that might incite it to do so are assembled. The question that we should ask ourselves, therefore, is why the majority of the population decides to stay at home, and only a minority considers emigrating.

3.2. Demographic pressure⁸

Demographic pressure and its consequences constitute the basic elements of our analysis. The impact of the population factor depends on its scale effects and structural effects. The scale effect bears upon a country's entire population at global level causing an increase in the expenditure necessary to its development. The structural effect determines the different constraints that burden its economy: pressure on the labour market is intensified as the proportion of the working-age population increases.

The Maghreb countries and Turkey are in the process of demographic transition. However, even though fertility rates are declining rapidly, demographic pressure is not likely to ease for some time, not until this transition is completed and the population has stabilized. In the meantime, the population continues to increase and its immediate future is predestined, since age structures, in which very young persons are particularly numerous, will ensure a major population growth over the next few years.

Such growth has a considerable impact on the labour market. The age structure is such that the tension will ease only in the long term, and increase in the short and medium term, as the millions of young persons who will enter the labour market are already born. The economically active population is currently increasing at a more rapid rate than that of the total population, owing to a time-lag of about twenty years between the decline in fertility and its effect on the number of young persons arriving on the labour market.

In the medium term, positive effects might be produced at national level by a decrease in social welfare spending as a result of the stabilization of the very young population. However, these gains will be limited by the costs of programmes to improve schools and increase the percentage of children in full-time education, as well as by the cost of health care services.

This demographic context will create obligations which will have to be taken into account in economic and social terms. However, even if the demographic factor is considered to be the most important element influencing migration pressure, interventions in this sector, while necessary, will have only marginal and, in any case, very long-term effects. Moreover, the

⁸ The figures used in this chapter have been calculated on the basis of: United Nations, *The Sex and Age Distribution of the World Populations: The 1994 Revision* (New York, 1995).

complexity of the phenomenon is such that it is not enough to succeed in slowing down population growth to hope for a reduction of the economic constraints that drive individuals to emigrate.

3.2.1. Demographic growth

In countries that have reached a stage of intermediary development, such as the Maghreb countries and Turkey, the population has increased enormously since the mid-fifties owing to a combination of high birth rates and falling death rates. The population has multiplied by 2.6 in the Maghreb and by 2.5 in Turkey, whereas it has multiplied by only 1.2 in Europe (Table 2). This increase, which is even greater than the world average, gives us an idea of the challenge confronting the North African and Turkish economies.

In the three countries of the Maghreb, annual rates of natural population growth (representing the surplus of births over deaths) reached a peak in the years 1970-1980, after which they started to decline. Apart from this point in common, the three countries present fairly different demographic characteristics. In Tunisia, the population growth rate was brought down from 2.6 per cent at the beginning of the seventies to a much lower level in the following years, as a result of an active policy to control demographic pressure and a change in the status of women. Since the nineties, Tunisia has been one of the small number of developing countries in which the level of population growth is lower than 2 per cent. With a population growth rate which went down from 2.7 per cent in the sixties to 2.4 per cent today, Morocco is not far from achieving comparable results. The population growth rate in Algeria, which was the highest in the region, is also declining rapidly, from 3.1 per cent in the 1975-1980 period to 2.7 per cent between 1990 and 1995. The 1994 figures show that the decline in fertility has been more rapid than expected in Morocco and Algeria. If rates continue to drop according to the same progression, the population of the Maghreb is like to have stabilized by the second half of the next century. When we examine the situation in the Maghreb and other Arab countries, we can see that, while they presented comparable demographic indicators in the early sixties, the Maghreb countries have since undergone more significant and more rapid changes. In Turkey, the annual population growth rate, which was 2.4 per cent in the early seventies, is now 1.8 per cent.

In the meantime, even though population growth rates are declining, the population itself continues to increase rapidly and the annual number of births has never been so high, because the population, and in particular the number of women of child-bearing age, has increased. According to the average population growth variant in the Maghreb, the population (at present 62.6 million) will number 70.5 million in the year 2000 and 82.9 million in 2010. This latter figure (37.4 million for Algeria, 11.2 million for Tunisia and 34.2 million for Morocco) will correspond to a doubling of the population since the 1975-1980 period. In the same way, according to the average population growth variant in Turkey, the population (today 60.7 million) will be 67.7 million in the year 2000 and 77.9 million in 2010. This second figure will correspond to a doubling of the population since the 1970-1975 period. The same figures also show that between 1990 and 2010 the population should increase by more than 12 million in Algeria, 10 million in Morocco, 3 million in Tunisia and 21 million in Turkey. Demographic pressure will, therefore, remain high and probably increase in the coming decades.

The projections for 2010, drawn up by the United Nations Organization in 1994, give an estimated margin of 78.3 to 87.1 million for the population of the Maghreb, and of 74.9 to 80.6 million for the Turkish population. These margins are calculated on the basis of the hypothesis that fertility trends will correspond to the low or high projection variant. The differences between the two variants are 8.7 million for the Maghreb and 5.7 million for Turkey.

The governments of the Maghreb countries and Turkey display a clear political will to lower the population growth rate. Initiatives designed to slow down demographic growth, such as programmes concerning the role of women, reproductive health and primary health care, will

have a major impact on the stabilization of the population and on the living conditions of families. Even if this impact will not be felt in a concrete way for several generations, it will certainly contribute, among other things, to reducing migration pressure both directly and indirectly.

3.2.2. Population structure

The demographic transition, a combination of two factors - lower birth rates and lower death rates -, which the Maghreb countries and Turkey experienced over the last few decades, could not fail to have repercussions on the age structure of the population. The first part of this transition, characterized by lower mortality, caused a considerable increase in the number of very young persons among the total population. The second phase, now in progress, characterized by declining natality, has necessarily the initial result, before the stabilization of the age pyramid, of reducing the proportion of the population under the age of 5, then that of the 5-14 age group, while at the same time progressively increasing the proportion of persons of working age (15-64) and, subsequently, that of those over the age of 65. This phenomenon will gradually present the country with new socio-economic problems.

3.2.3. Youth population

In the Maghreb and Turkey, the beginning of the demographic transition, characterized by a sharp decline in mortality and very high birth rates, caused a rapid increase in the very young population. The proportion of the population under the age of 15, which varied in the fifties between 38 per cent and 44 per cent according to country, progressively rose, reaching a peak of about 48 per cent at the beginning of the seventies, after which it began to decrease. This peak was not quite so high in Turkey (42 per cent). When we examine the 5-14 age group, we see that its share in the total population continued to increase until the early eighties. In Tunisia, where the phenomenon of demographic transition took off earlier, the maximum inflation in this age group occurred at the beginning of the seventies. At present, persons under the age of 15 account for 42 per cent of the population in Algeria, 39 per cent in Morocco, 38 per cent in Tunisia and 35 per cent in Turkey. By comparison, we see that in Western Europe persons under the age of 15 represented 23 per cent of the population in the early fifties; their proportion increased to 24 per cent at the end of the sixties, and subsequently fell, accounting for 18 per cent today.

While fertility has continued to drop at the same rate in the Maghreb countries, the proportion of persons under the age of 15 to the total population will continue to decline and will amount to 27-31 per cent in 2010 and about 20 per cent in 2050.

Even if statistics for the Maghreb countries and Turkey point to a decline in the very young population, in absolute terms the number of individuals in this age group will continue to grow, solely as a result of demographic momentum, since the rapid increase in the population of child-bearing age will lead to a subsequent increase in the annual number of births, which will keep the number of very young persons at a high level. As we shall see in the chapter on social investment, the need to provide this population with education and medical care will require heavy future investments on the part of the countries concerned.

3.2.4. The working-age population

The working-age population comprises persons between the ages of 15 and 64. This population, as a percentage of the total population, has been on the increase since the early seventies (corresponding to the beginning of the decrease in the proportion of those under the age of 15). Compared with the present 55 per cent in Algeria, 57 per cent in Morocco, 58 per cent in Tunisia and 61 per cent in Turkey, it will be in the region of 66 per cent in 2010 and will probably

rise to peaks of 70 per cent towards 2020-2025. The 15-24 age group in particular, which accounted for about 18 per cent of the population in the 1950-1980 period, had risen to 21 per cent by 1990, will represent 22 per cent of the population at the end of the century, and then the proportion will decline. By comparison, the working-age population in Western Europe accounts at present for 68 per cent of the total population, while persons between the ages of 15 and 24 represent 14 per cent.

In absolute terms, the progression of the population aged between 15 and 64 is stable (Table 3). The working-age population today is 13.6 million in Algeria, 14 million in Morocco, 4.7 million in Tunisia and 34.2 million in Turkey. These figures bear out the doubling of this population within the space of two decades, between 1970 and 1990. In absolute terms, it will have increased by 16 million in the Maghreb and 15 million in Turkey during this period. By the year 2010, the working-age population will be 24.4 million in Algeria, 23.1 million in Morocco, 7.6 million in Tunisia and 51.3 million in Turkey. It will therefore have multiplied by 1.8 in the two decades between 1990 and 2010, and will have increased, in absolute terms, by 22 million in the Maghreb and 17 million in Turkey.

As illustrated in Table 3, the growth in absolute terms of the working-age population has already been accurately established up to 2005, since this population is already born, and there is therefore no difference between the high, medium and low growth variants. For the period between 2005 and 2010, there is a gap between the variants, but only of a mere million persons in the Maghreb and 500,000 in Turkey. This population will therefore have multiplied by 1.8 in the two decades between 1990 and 2010 and increased, in absolute terms, by 22 million in the Maghreb and 17 million in Turkey. These findings help us to see that, in the next 15 years, the working-age population will not depend on the hypothesis of fertility rates and that, whatever may be done to reduce demographic upsurge in these countries, the effects will not be felt at the level of the working-age population until after 2010.

While the growth rate of the working-age population has begun to decrease, it is still higher than the total population growth rate, and this situation suggests that the labour market will be subject to heavy pressure for several decades yet.

This evolution will entail a favourable turn in the rate of demographic dependence (ratio between persons under 15 or over 65 and those of working age). This will mean that the strain placed by the inactive on the active will be eased, and this could have positive effects on the countries' development capacities. If we take Tunisia as an example, we see that, while in 1970 there was one person of non-active age for every person of active age, by 2010 there will be one inactive person for every two persons of working age. However, the positive impact on development will manifest itself only if persons of working age who want to work, actually succeed in finding work. But how can employment be guaranteed for all those who want to work? The figures relating to the increase in the working-age population give us an indication of the magnitude of the problem. Thus, youth should be the target group on which to focus socio-economic investment, in terms of improving the quality of education and training, and facilitating their entry into economically active life. However, the cost of such investment would require a proportional stepping-up of economic growth, to a degree that is difficult to visualize in the present situation of the countries concerned. Since it is impossible to imagine the positive impact of the growth of the active population on the economy, we shall have to examine its negative effects on the imbalances of the labour market.

3.2.5. The elderly population

In the coming century, the proportion of persons over the age of 65, who today account for 4 per cent of the total population in the Maghreb and in Turkey, will increase progressively to about 15 per cent of the population by 2050. By comparison, in Western Europe persons over the

age of 65 represent 14 per cent of the population at present, and will represent 27 per cent by 2050. The problem of senior citizens at present confronting the countries of Europe will also arise in the Southern Mediterranean countries and Turkey in the coming century. The percentage increase in this age group will first affect Tunisia and Turkey, which began their demographic transition earlier.

3.2.6. Social investments

Population growth has, in the past, been reflected, and will continue to be reflected, in an additional demand for social welfare, education, health care services and community facilities. In order to meet the demands of this increased population, countries will have to develop social infrastructures, if only to maintain present living standards. The social welfare budget will consequently have to be increased and can be used only marginally to improve the quality of these services. Nevertheless, improvement in living standards, education and health care is all the more essential as it greatly influences not only the lowering of fertility rates but also migration pressure.

Increased spending on the social sectors and on housing will consume major resources which could have been allocated to productive and employment-creating investments to promote development. In Tunisia, according to the Seventh Development Plan (1992-1996), in view of the population increase, an improvement in living standards would require an economic growth rate of about 6 per cent. In Morocco and Algeria, where the population growth rate is higher, a perceptible improvement in living standards is difficult to visualize, at least for the next few generations.

Projections concerning health care needs show that public spending on health care would have to increase at a faster rate than GDP in order to improve existing benefits and extend them to the sections of the population that do not yet have access to health care services. This category represented 7.6 per cent of the total population in Morocco and 3.1 per cent in Algeria at the beginning of the nineties. Public spending on health amounted to 5.4 per cent of GDP in Algeria, 3.3 per cent in Tunisia and 0.9 per cent in Morocco (UNDP, 1995).

As for education, numbers of schoolchildren will rise more rapidly than the total population because of the increase in this age group and also because there will be a general rise in the numbers of persons, male and female, in full-time education. The share of the budget devoted to education, expressed as a percentage of GDP - 9.1 per cent in Algeria, 5.5 per cent in Morocco and 6.1 per cent in Tunisia in 1990 (UNDP, 1995) - should increase as a result.

As we have already indicated, the stabilization of the very young population would in the immediate future lead to a reduction in the social spending necessary today in order to meet the needs of a larger population. This fact, combined with the increased percentage of the working-age population in relation to total population, will result in the countries' registering a lower rate of dependence and a more favourable structure as regards keeping social costs under control. If economic development were to make it possible to create the necessary jobs, there would be new possibilities of improving the quality of education and health services. However, the social cost of structural adjustment programmes could have an adverse effect on human development. Education and primary health care could pay the price in respect of both quality and quantity.

3.3. The economically active population

3.3.1. Trends and prospects

The activity rate is the proportion of persons considered to be economically active, that is to say all persons who work or are unemployed. The size of the active population in a country at a given moment is the result of a demographic phenomenon, of migration trends, and of a type

of behaviour, since many socio-economic factors affect the propensity to work of a population, especially among young persons and women.

The activity rates used here are those established by the ILO in 1986 (*Active Population, 1950-2025*) and 1995 (*Bulletin of Labour Statistics 1995-2*), and we shall apply them to the latest population estimates and projections established by the United Nations (United Nations, 1995) (Tables 4 to 7 and 8 to 15)⁹. Unless stated to the contrary, we shall refer to the average variant of population growth projections. The two series of activity rates will be used in combination, because they are based on different definitions of the active individual. These two series, applied to the high and low variants of population growth projection, will enable us to define two growth scenarios concerning the supply of labour, which we shall use in the application of the flow model in the final section of the study.

The activity rates observed in the Maghreb in the course of forty years are in general modest, compared with those of EU countries, and can be attributed to the youth of the population and to the poor representation of women in the labour world. However, we shall see that this situation should develop, bearing in mind the changes in population structure (see Chapter 3.2.2.) and an increased propensity of women to work.

3.3.2. Estimates

Estimates established in 1986 for the 1950-1980 period show extremely low activity rates in the Maghreb countries. These rates are partly the consequence of the fact that official statistics do not often include women's employment outside the modern sector of remunerated employment. In these statistics, for example, the category of female family workers, mainly to be found in agriculture but also in the urban informal sector, is not counted in the active population. Estimates from 1995 show higher activity rates, because of the fact that, in the official statistics, it was intended to reveal the existence of a "hidden" workforce, which had not previously been counted. Experts want thus to take greater account of women's work and work carried on outside the modern structured market. The same change in the figures relating to the active population occurred in Italy in the seventies.

According to 1995 estimates, *global* activity rates in 1990 were 30 per cent in Algeria, 38 per cent in Morocco and 35 per cent in Tunisia, and *women's* participation in these rates was 15 per cent in Algeria, 26 per cent in Morocco and 21 per cent in Tunisia. While the official statistical sources used in 1986 tended to underestimate the effective dimension of the labour supply, these new figures might, in fact, overestimate women's participation in economic activity, which is often of a seasonal or part-time nature, and thus underestimate under-employment and non-remunerated work among the female populations.

However, even according to the new figures, the rates indicate lower levels than in other Mediterranean countries. By comparison, activity rates were 45 per cent in France and 40 per cent in Italy and Spain at the beginning of the nineties. Activity rates for women for the same period were 39 per cent in France and 29 per cent in Spain and Italy (ILO, 1995).

The activity rates registered in Turkey in 1990 were very high - 44 per cent for both sexes and 39 per cent for women - higher even than those of certain European countries. However, these rates were the result of an overestimation of the number of workers employed in the agricultural sector (Venturini, 1990).

⁹ The activity rates calculated on the basis of those established by the ILO, and the calculation of the active population, represent the conclusions of the author of this study and should not be considered as official ILO statistics.

The evolution of activity rates broken down according to sex in the Maghreb reveals different national situations. According to 1986 statistics, activity rates for women had changed little in Algeria, whereas in Tunisia the rate had risen since the end of the sixties especially in respect of women under the age of 29. However, the new activity rates established in 1995 show that in Tunisia the women's rate has remained stable since the beginning of the eighties. This phenomenon is linked to an attitude of discouragement brought about by the deterioration of the job market. In Morocco, women's activity continues to increase even though the activity rates are lower than in Tunisia.

As regards global activity rates, the rise in women's activity rates has been offset, but only in part, by the fall in men's activity rates as a result of the decrease in child labour and increased school attendance, as well as the duration of schooling.

3.3.3. Projections

In the projections of activity rates established in 1986 for the 1985-2025 period, hypotheses were advanced on increased activity rates according to sex and age group, bearing in mind the evolution of factors that influence participation, on the basis of experiences in other countries. According to these projections, global rates are expected to rise as a result of the gradual change in the population structure and the increase in the number of women entering the labour market. These rates, in 2010 should be 30 per cent in Algeria, 40 per cent in Morocco and 39 per cent in Tunisia, but 46 per cent in Turkey. As we have already seen in the chapter on demographic pressure, the decline in the proportion of very young persons and the increase in the working-age population will be among the causes of increased activity rates. We also see that activity rates for men should rise in Algeria from 41 per cent at the beginning of the nineties to 51 per cent by 2010, in Morocco from 50 per cent to 59 per cent, in Tunisia from 49 per cent to 58 per cent and in Turkey from 56 per cent to 58 per cent. The growing influx of women on to the labour market can be explained by socio-economic pressures, their higher level of education, as well as the increasing demand for women workers. Women's activity rates, already rising rapidly, should increase at a faster rate than men's during the coming decades, reaching 8 per cent in Algeria, 21 per cent in Morocco, 20 per cent in Tunisia and 34 per cent in Turkey by 2010.

According to the same projections, the evolution in the participation of different groups will give rise to changes in the composition of the entire active population. Increased women's participation will be accompanied, in fact, by reduced participation of young persons and of persons over the age of 60. The projections even indicate that employment of children under the age of 15 should have been practically eliminated by 2010 (2020 in the case of Morocco), but we know that these official statements greatly underestimate the present situation.

If one takes as a calculation basis activity rates according to age and sex as established by the ILO in 1986 for the 1985-2025 period and the average population projection variant established by the UN in 1995, we see that during the period 1990-2010, the active population should go up from 6 to 12 million in Algeria, 8 to 13 million in Morocco, 3 to 4 million in Tunisia and 24 to 35 million in Turkey (Tables 4 to 7). For the Maghreb, these figures for 2010 will be equivalent to a doubling of the active population since the eighties, while, in Turkey it will correspond to a doubling since the end of the seventies.

The determinants of activity behaviour patterns that influence the supply of labour are sufficiently clearly identified, in particular in these times of socio-economic change. Global projections concerning the volume of the active population, which were established on the basis of 1986 figures and have proved to be underestimates, could be out of date and turn out to be even more markedly underestimated because of the unfavourable economic situation. Rising unemployment among the adult population might drive families to take their children out of school

and set them to work in order to augment the family income, and elderly persons might be forced to continue working after normal retirement age. Moreover, the ongoing radical changes in the production sectors could cause women's participation to increase at an even faster rate than envisaged, because of the possible expansion of activities that require the skills of a female workforce.

Unfortunately, the statistics published in 1995 do not contain projections. We have therefore established projections, using the same average annual active population growth rates as those used in the 1986 projections, and we have applied them to population growth estimates established by the UN in 1995.

As regards the growth of the active population, and bearing in mind the requirements of our analysis, we shall take two growth hypotheses into account (Tables 8 to 15 and 16). In the first - minimum scenario - the development of the active population is calculated on the basis of the projections indicating increased activity rates established in 1986 and applied to the low population growth variant established by the UN in 1995. As we saw earlier, these rates are likely to underestimate actual activity. In the second hypothesis - maximum scenario - the increase in the active population has been calculated by using activity rate projections calculated on the basis of 1995 ILO statistics and applied to the high population growth variant established by the UN in 1995. As we also saw earlier, these rates are likely to overestimate real activity. The difference between the minimum and maximum scenarios (Table 16) would amount to 7.5 million active persons in 2010 for the entire Maghreb and 2.2 million for Turkey. For Turkey, the difference between the two scenarios is limited by the fact that the activity rates established by the ILO in 1986 already tended to overestimate the active population of Turkey (as a result of an overestimation of the number of active persons actually employed).

These scenarios will enable us to determine an estimation margin in the evolution of the active population, and consequently to evaluate the pressure to which labour markets will be subjected in the course of the coming decades. Moreover, we shall use these two labour-supply growth scenarios in the chapter on the prospective study of migration pressure, by placing them in relation with two labour-demand growth scenarios.

3.3.4. Disparities between labour supply and demand

Employment levels are the result of the interaction between the supply of and the demand for labour. Supply is determined by demographic and socio-economic factors, as we saw earlier. Demand, in the broad sense of the term (that is to say the availability of remunerated employment and the existence of possibilities of self-employment), is determined by both macro and micro-economic factors (ILO, 1994).

Here, we must estimate the size of the gap between growth in the active population and the volume of employment creation. The additional supply of labour is an annual average calculated in accordance with the growth of the active population over a given period, whereas employment creation is an annual average calculated according to the growth of the employed population over the same period. Thus, the additional number of unemployed persons, due to the gap between labour supply and job creation in a given period is considered as reflecting the evolution of unemployment during the same period (ILO, 1994). In any country, at a given moment, the disequilibrium between internal labour supply and demand is reflected by a surplus of labour.

The trends revealed in the Maghreb countries during the past few decades show a rapid increase in the active population and a worsening of the disequilibrium between labour supply and demand. In fact, in these countries, despite the improvement in dependence ratio (inactive/active) which we referred to earlier, the employment ratio (unemployed + inactive/employment) has varied little. This last ratio provides an appropriate instrument for measuring the situation on the job market (Tapinos, 1994). While the active population has increased at a faster rate than the total

population, the actually employed active population has increased less rapidly than the active population. The result is that the employment market situation has deteriorated.

In the past, international migrations provided traditional solutions and spontaneous responses to labour-market disequilibrium. At present, the rapid increase in the workforce surplus, accompanied by an improvement in education standards, might suggest that the number of potential migrants is on the increase. However, there is no direct link between unemployment and migration, since an unemployed or under-employed person is not always a potential migrant and, conversely, there are persons who have a job and still want to emigrate. Without contesting this fact, we shall, none the less, base our flow model on this surplus labour, using it as an indicator of labour market disequilibrium, in order to measure potential migration and migration pressure.

In analysing situations, it must be borne in mind that employment statistics are to be interpreted with caution and are not easily comparable at international level, as they are calculated differently according to country. Unemployment figures often show deficiencies resulting from the fact that the definition of unemployment and methods of measuring it vary from country to country or even in the one country at different periods.

3.3.5. Results

Achievements in the matter of employment creation have always fallen short of needs¹⁰ and been below the expectations of economic plans. This discrepancy between the volume of employment envisaged and that which is actually achieved provides a good illustration of the unreliable nature of any quantitative connection between number of job seekers and number of jobs created.

In Algeria, the number newly created jobs, estimated at 140,000 per year in the early eighties, has decreased steadily; there have been fewer than 100,000 since 1985, though the target of the 1985-1989 plan was 180,000 new jobs each year. At the same time, the active population was increasing annually by almost 200,000 persons.

In Morocco, 151,000 jobs were created each year between 1971 and 1982, but the number has fallen since then. Between 1982 and 1990, the discrepancy between employment creation and additional labour supply is illustrated by the fact that, while 124,000 jobs were created each year, the annual additional labour supply amounted to 160,000 persons.

In Tunisia, the disparity between forecasts and performance in respect of employment creation, on the one hand, and between achievements in employment creation and additional supply of labour, on the other, is shown in Table 17. For the entire period from 1973 to 1991, the rate of absorption of additional labour supply into employment was 68 per cent. The Eighth Plan (1992-96) reckoned with a balance between the additional labour supply and demand through the creation of an average of 64,000 jobs per year. As for actual performance, for the 1992-1994 period the rate of absorption of the additional labour supply was 84 per cent (Ministry of Economic Development, Tunis, 1994). However, as we shall see later, the projections concerning the additional labour supply established by the Tunisian Government underestimate the actual supply, which would appear therefore to be less than for the period from 1987 to 1991. Table 17 also shows that in the 1973-1986 period, 22 per cent of additional jobs created were in public administration. This percentage fell to 15 per cent for the 1992-1994 period. In this latter period, most of the jobs created were in the "trade and other services" sector.

In Tunisia, projections established for the decade from 1990 to 2000 indicate that an economic growth rate of at least 6 per cent would have to be generated to cover the additional

¹⁰ The volumes of labour supply indicated in this chapter are those established by the authorities in the Maghreb countries and not those calculated and used by the author in the other chapters. The two sets of data, while not strictly comparable, are close.

labour supply alone. Moreover, as we have already remarked for the period covered by the Eighth Plan (1992-1996), the additional labour supply was underestimated, to the extent that these projections considered only persons between the ages of 18 and 59 as belonging to the active population. In this respect, the Tunisian authorities plan to apply early retirement measures and extend the duration of school attendance. Another factor of underestimation: the hypothesis concerning women's activity rates, since the planners reckoned with a slight drop in this rate compared to that registered for the 1984-1989 period, whereas this hypothesis contradicts the trend towards increased schooling and employment for women. Without calling the Tunisian forecasts into question, we may consider that, to absorb the additional labour supply, even if this has been underestimated, an annual investment growth rate of 10 per cent would be necessary. For this, Tunisia, and the other countries also, would have to resort to external financing, which can only be by direct foreign investment, given that external financial equilibrium measures make it impossible for the country to increase its foreign debt.

3.3.6. Unemployment

While *unemployment rates* were low in general during the sixties and seventies, they started to rise in the two succeeding decades and are now very high and still rising in the three countries. Unemployment was estimated in 1992 at 13.8 per cent in Algeria, 13.2 per cent in Morocco and 16 per cent in Tunisia. In Turkey, a certain stabilization of the unemployment rate has been observed since 1986, at about 10 per cent, thanks to a sharp increase in employment in industry, construction and the services sector, but also as a result of overestimation of the number of workers actually employed. In absolute figures, Algeria had 1.5 million unemployed in 1992, Morocco 1.1 million, Tunisia 400,000 and Turkey 1.6 million. Urban unemployment rates are in general higher than national unemployment rates, in view of the tendency for the population to increase and women's activity rates in the urban areas to be higher than the national average. In Morocco, the urban unemployment rate was 16 per cent in 1992.

Unemployment particularly affects *young persons under the age of 25* and first-time job seekers. In Algeria, 67 per cent of the unemployed in 1992 were under the age of 25, and first-time job seekers accounted for 63.6 per cent of all job seekers. In Tunisia, 46 per cent of unemployed persons in 1989 were looking for work for the first time. Unemployment today can, in fact, be attributed mainly to the impossibility for new arrivals among the active population of finding a job, rather than to lay-offs of employed workers. Unemployment has also rapidly increased among young graduates, who used practically to have a guarantee of employment in the public service. This phenomenon gives rise to great concern, bearing in mind that, with the general improvement in respect of education in these countries, the proportion of young graduates today is higher than during the preceding decades, and it will continue to increase.

We have also observed an increase in the rate of *women's unemployment*, especially in the case of young women. In 1992, the women's unemployment rate was 20.3 per cent in Algeria, where 75.4 per cent of women under the age of 25 were without work. In Tunisia, the women's unemployment rate increased after the early eighties and had reached 21.9 per cent by 1989. Several explanations can be advanced for this increase in women's unemployment. The first is that educated young women look for work in sectors where employment is not on the increase, for example, the public sector. Another reason is that women's entry onto the labour market took place above all during the eighties, a period in which employment creation was limited.

Side by side with unemployment, there has also been an increase in *under-employment*. Even though the figures are not reliable, we have already witnessed an increase, especially in the urban informal sector and in agriculture, in low-productivity work, where skills or qualifications are under-used and remuneration lower than the minimum wage.

The situation of the employment market is the central problem area of the Maghreb countries' economies, and employment creation is one of the most pressing issues to be addressed in this area. Mass unemployment and under-employment creates a socio-economic problem, and while there is an obvious connection between unemployment and poverty, unemployment can also give rise to social and political conflict. The fact that young people, for the most part, are affected by unemployment can have even more serious political and social consequences and lead, directly or indirectly, to increased emigration pressure. The fact that unemployment today is mainly to be attributed to the impossibility of finding work for new arrivals among the active population, is further justification for the use of our model of flow of new entrants into the employment market as a basis for determining the pressure of migration from these countries.

3.3.7. Employment and vocational training policies

In the employment sector, many different and, at times, contradictory policies have been introduced. These policies, as well as the general employment situation, have been the consequences of economic and investment policy measures. However, while sustained efforts have been made in respect of investment and financing, and while economic achievements have been registered in respect of growth, the expected positive effects on employment have not been produced, and the unemployment situation has remained unchanged.

In the sixties and seventies, the countries of the Maghreb opted for a development model that favoured capital-intensive investment. According to the political authorities, the essence of development was industrialization and the provision of enterprises with heavy equipment. The financial costs resulting from this choice were aggravated by rising labour costs, which increased at a faster rate than productivity gains, in combination with a policy in respect of prices, wages and economic incentives designed to encourage capital-intensive rather than labour-intensive activities and technologies. One of the results of these policies was insufficient employment creation to match the supply of labour. However, governments considered unemployment and under-employment in the informal sector to be inevitable but temporary consequences. To back up these development choices, an emigration policy was introduced in respect of manpower surplus to the country's requirements. These policies were also accompanied by the implementation of social programmes to combat unemployment. In Tunisia, a number of worksites set up to combat unemployment provided work for up to 40 per cent of the employed population (Baccar, Sanaa, 1990). At the same time, and especially in the seventies, employment policies favoured the promotion of public sector employment, in particular in public administration.

Since the beginning of the eighties and with the redefinition of the development model, the governments of the Maghreb countries, Morocco and Tunisia in particular, have approved a series of measures to reappraise investment and employment, in order to neutralize the negative effects of the preceding period. These changes were also necessary in order to reflect the contribution of emigration to the reduction in the employment demand.

The private sector was to take over in the field of employment creation and, with this in view, governments intervened to develop a system of employment support, adaptability of the workforce to the labour market and reduction of labour costs. The newly introduced measures were backed by new investment regulations. In Tunisia, the competent authorities tried to promote employment by reducing employers' social security contributions. They also sought to increase the possibilities of employing young persons on purpose-designed projects. In addition to these interventions, employment promotion activities focused on the support and creation of small and medium-sized enterprises and employment creation programmes in rural areas. Morocco is developing in the same direction.

However, even now, and especially in the context of structural adjustment programmes, employment is not considered as an objective in itself, and it can only be one consequence of the

activities and expansion of enterprises. Indeed, the authorities in charge of economic policy are currently of the opinion that encouraging employment at the expense of competitive technology may put a brake on the expansion of enterprises and their internal and external competitiveness, and therefore be an obstacle to employment promotion in the long term. Moreover, given that the expansion of the private sector is based on exports and the fact that this sector is subject to international competition, employment policy will have to opt for wage restraint measures. This policy could have negative social effects and an impact on migration pressure.

The current approach to the problem consists in more effectively resolving the social question of unemployment, without calling into question long-term economic growth potential and internal and external equilibria. Such a problem requires a more effective use than in the past of scarce economic resources and identification of new promising gaps in the market that will be productive as well as employment-generating.

Admitting that the employment question calls for a multidimensional rather than a demand-side response, it would be necessary to work on the supply side to ensure correspondence between enterprise requirements and the workforce available on the employment market. Indeed, discrepancies between the qualifications, training levels and manpower requirements have in the past placed serious constraints on the employment market.

The establishment of a better correlation between training and employment requires a more dynamic attitude on the part of planners, trainers and employers. Planners, in the sense that they should always seek to improve prospective instruments so as to limit the effects of certain variables that are sometimes difficult to control: occupational mobility, technological changes. Trainers, who will have to introduce greater flexibility in their training programmes, should be more receptive to the environment and reduce the negative effects resulting from an increasingly high social demand for education and training. Finally employers, as end-consumers of the "education product", should take a larger part in the definition of new training methods and programmes (Youzbachi, 1990).

In fact, training should be the chief priority of employment policy at present. Challenges in connection with technological innovation and the speed at which it advances, call for major efforts in the vocational training and retraining sector. Improvement of the quality of manufactured goods, as well as standardization, indispensable conditions for export growth, cannot be brought about without in-depth adaptation of training policies and systems.

3.4. Economic development

The migration phenomenon is an integral part of the development process and, while development has an effect on migration, migrations, in their turn, have an effect on development.

The history of most countries shows that the development process causes profound changes in a country's socio-economic structure, encourages the opening-up of these countries and their peoples to the outside world, and is one of the main causes of population movements. Studies of migration patterns bear out that there is a relation between economic development, drift from the land and international migrations.

Moreover, the migration phenomenon itself has an impact at the level of the macro-economic equilibrium of the countries concerned, because of capital repatriated by emigrants and the brain drain, just as it has economic and social consequences for the migrants' local communities of origin.

3.4.1. Effects of development on migrations

The migrants' countries of origin have for the most part already attained a certain level of development, and immigrants in Europe do not come from the poorest classes of their societies of

origin. This indicates that the poorest population at international level or within a country has no possibility of emigrating. It is only after a certain stage of economic expansion that development and improved living standards make emigration less advantageous and give the population the means to become economically integrated at home, thus acting as a brake on emigration. We find examples of this inversion of the migration phenomenon trend in the countries of Southern Europe and certain Asian countries.

At microeconomic level, the explanation is that development gives rise to major social changes and provides individuals and families with the financial means and the necessary education and information levels to aspire to leaving their country, as well as the material possibility of so doing. Social development opens up new horizons and alters the value systems of individuals and families.

At country level, the industrialization process involves a phenomenon of sectoral diversification of the economy and therefore increased mobility of individuals between sectors of activities and between regions, which indirectly creates a strong incentive to urbanization and emigration. The industrial development pattern in fact reduces employment in agriculture and drives out the rural population, creating an international migration potential. An estimate of this phenomenon could be calculated on the basis of the rate of drift from the land in a given country. After industrialization, the next stage of economic development, characterized by the use of new information and production technologies, will modify the skills required and the demand for labour. This phenomenon, together with the economic and social changes brought about by the globalization of the economy, will in its turn influence migration pressure (Kultalahti, 1994).

The Maghreb countries and Turkey, which are considered to be among the middle-income developing countries, are still at the stage of development which does not offer sufficient opportunities of integration within the population, but rather creates incentives to emigrate. This is accompanied, as we shall see later, by urbanization trends which will remain strong over the coming decades. In these countries, economic development today involves modernization of agriculture, in particular in Morocco and Turkey, and the restructuring of the industrial sector, implemented within the framework of the structural adjustment programmes, which sooner or later have the effect of eliminating jobs. Such economic policy decisions, considered necessary in order to guarantee these countries' economic development in the long term, will, in the short term, increase the propensity of part of the population to emigrate. Economic and social development is also accompanied by a trend toward increasing numbers of women entering the labour market, and this trend will continue in the coming years. This fact, added to the basic element which is the rapid increase in the working-age population, will lead to a general increase in activity rates and an exacerbation of tensions on the employment market, and will have its effects on the labour surplus at national level and therefore on the migration potential. This will be borne out in our analysis.

It is only after a certain stage of development, involving, within the country, increased earnings, economic opportunities for workers and an improvement in social well-being, that a country can offer its population a standard of living which acts as an incentive to integration at home and as a prevention of emigration. It is difficult to establish at what moment the impetus of economic development driving individuals to emigrate will be transformed into an incentive to stay at home. According to the findings of a survey by Faini and Venturini (1994), Turkey is nowhere near the turning point, the level of per capita income which tips the balance between a propensity to emigrate and a propensity to integrate at home. If we apply the same analysis to the Maghreb countries, we shall arrive at the same results.

3.4.2. The effects of migrations on development

Emigration has long been considered as a development factor for the countries and regions of origin or as a substitute for development, since the migration of workers eases the pressure on the labour market and, consequently reduces unemployment, raises real wages, creates a more skilled workforce and generates cash remittances. However, the reality of these advantages is open to question.

One of the principal economic effects of international migration on the migrants' countries of origin is the contribution provided by cash remittances from the migrant workers. The countries profit from the entry of foreign currency, and these transfers help to raise the living standards of the families that remain at home, and, when spent at home, can have an impact on the national economy. Despite the halt to the emigration of workers and the departure of families under the family reunification system, the amount of money sent home by migrant workers is still very considerable. Lacking precise data on this phenomenon, we can nevertheless infer that families now settled in Europe must, in theory, have reduced these remittances. However, the volume of such remittances remains substantial, thanks to the contribution of emigrant workers in an irregular situation who, being for the most part men on their own, maintain closer links with their families at home. If the European policy to put a stop to this type of immigration were to have a genuine effect, the economic consequences for the countries of origin would be very serious.

The emigration flow under the system of family reunification is considered as the cause of a decrease in repatriation of wages to the countries of origin, because the workers settle permanently in the host country, reducing the proportion of the money once invested in the home country in anticipation of their return, and giving preference to investments in the host country where they are now residents. Indeed, they must devote more money to the long-term establishment of their family in the country of residence, and this, together with day-to-day household spending, reduces their ability to save. In the economic crisis situation in Europe, increased unemployment among immigrants and the spread of precarious employment, not only for illegal but also legal immigrants, means that they have little ability to save, and this proportionately reduces the cash remittances to the families that have stayed behind in the Maghreb. Where individuals are in an irregular situation, moreover, the possibilities of effecting cash transfers to their families through official channels may be very limited. The fact that workers are kept in a precarious situation in Europe also hurts the countries of origin in financial terms.

However, we must also take into account that, from the end of the eighties, the new monetary policy applied in Tunisia and Morocco, involving, among other things, the lifting of restrictions on exchange and on the repatriation of money, has led to an increase in remittances from emigrants. The value of these remittances has increased because of currency devaluation.

It is not easy to establish the total amount of these remittances, since part of the money does not go through official channels; another part is sent not in cash but in kind and is not therefore quantifiable. In the Maghreb, this phenomenon is particularly manifest in Algeria, which receives repatriations of wages that are far lower in cash value than those received by other Maghreb countries, but which is sent under cover of considerable remittances in kind, which are rarely identified. In 1993, the cash sent by emigrant workers represented 53 per cent of export earnings for Morocco, 16 per cent for Tunisia and 19 per cent for Turkey (IMF). The countries of origin receive more money from cash transfers effected by emigrants than they do from development aid from donor countries. While in 1993 total public development aid was equivalent to 2.8 per cent of GNP in Morocco, the repatriation of emigrants' earnings was equivalent to 7.3 per cent; these proportions were, respectively, 1.7 per cent and 4 per cent for Tunisia, 0.3 per cent and 4 per cent for Turkey (World Bank, 1995). Furthermore, in the nineties, repatriations of emigrant earnings represented about double the volume of direct foreign investments and provided the most stable capital inflow over time.

However, this financial contribution from the emigrants far from provides a remedy for the problems of development, since cash remittances are often not used in a productive manner and

do not allow the creation of many jobs. Finally, these transfers often aggravate the inequalities in income in the community of origin, or cause inflationary pressure which further impoverishes families that do not receive such transfers and possibly drive these families themselves to emigrate, thus maintaining a heavy migration pressure, especially in rural areas.

Among the reasons for questioning the positive effects of emigration on development, we would also include the fact that, in the event of return, the migrants have very little opportunity to use the skills acquired abroad and few possibilities of productive investment (Mezdour, 1993). This has contributed to the declining probability of return, to the establishment of the families in Europe and to the decline in their remittances.

Furthermore, since those who leave are the most enterprising, educated and skilled elements, migration also produces a brain drain. This phenomenon is a sign not only of disequilibrium between demand and supply in respect of skilled labour within the country, but also of international disequilibrium in skilled workers' earnings between the migrants' country of origin and the countries to which they are attracted. This type of migration represents a considerable financial loss to the country of origin, which has paid for the training of these specialists. It is reflected in a depletion of the country's human resources, especially technicians specializing in new technologies, and thus hampers development. The brain drain is also a reality at regional level, since it concerns the departure from rural districts of persons having acquired an education above the local average (Cammelli, 1990). Such persons would be indispensable to their region of origin in the creation of an economic fabric which would make possible the integration of new young entrants onto the labour market and thus reduce urbanization and emigration pressure.

Nonetheless, despite these disadvantages, the migration of the workforce does present elements that can enhance the growth of the countries of origin. For the countries that support emigration, the strategy would be to organize migration in such a manner as to increase its real advantages to a maximum.

3.4.3. Social and economic trends

From the date of their independence to the present, the countries of the Maghreb have experienced profound economic upheavals, resulting from both internal as well as international political and economic developments. We can divide their economic history into three distinct phases. The first, starting with decolonization and lasting until the first oil crisis of the seventies, is characterized by sustained growth. The second, covering the period from the mid-seventies to the mid-eighties, is marked by economic stagnation. The third period, from the mid-eighties to the present, is distinguished by the implementation of stabilization and structural adjustment programmes. Even though the achievements of four decades of development have had a number of positive aspects, they have seldom kept pace with plans and forecasts, and this raises the question of economic policy and strategies.

In the period stretching from the creation of the new States until 1975, the countries of the Maghreb pursued economic policies characterized by strict State control of the economy; they established an economy of import substitution focused on the domestic market, and embarked on public spending amounting to a considerable sum made possible by substantial earnings from oil and phosphates. The sixties were marked by the rise in oil and phosphate prices, improving the terms of trade for countries exporting these commodities, and also by a moderate growth in GDP.

The 1975-1985 decade witnessed the beginnings and intensification in all these countries of an unprecedented crisis, which obliged them to introduce structural adjustment measures in the second half of the eighties. During this period, the countries of the Maghreb suffered from the instability of the international economy and above all from the European recession. The fall in the prices of oil products and commodities from 1982 onward and the simultaneous decline in repatriation of emigrants' earnings led to a major deterioration in their external accounts. This

external imbalance, which was accompanied by continued substantial subsidies from the public economy, led to a serious deterioration in the budgetary situations. From the end of the seventies, the Tunisian and Moroccan governments pursued an economic stabilization policy, which proved inadequate, and they were finally obliged to admit that they could no longer pursue a growth and investment policy that resulted in considerable external debt. The decline in growth rates registered during this period led to reduced employment creation and, consequently, to increased unemployment and under-employment. In Morocco, the average annual GDP growth rate was 5.3 per cent during the 1976-1980 period and 3.4 per cent during the 1981-1985 period, but with considerable fluctuations. In Tunisia, during the 1975-1980 period, economic growth remained stable (7 per cent per year), whereas it declined in the 1981-1985 period, during which average annual GDP growth was 3.3 per cent. Algeria had an average annual GDP growth rate of 5.5 per cent for the 1980-1985, thanks to oil revenues, though the economic context continued to deteriorate.

The period from 1985 to the present has been marked by a gradual recovery, followed by a crisis caused by the subsequent fall in commodity prices, the 1990-1991 Gulf crisis, and the drought that hit the agricultural sector in 1992-1994. This period witnessed the end of self-centred development policies and the introduction of a new economic policy with the structural adjustment programmes. This policy appeared to be indispensable to the restoration of internal and external economic equilibrium. The period has been characterized by major annual fluctuations in growth, due to the vulnerability of economies to external shock. In Morocco, the average GDP growth rate during the 1986-1991 period was 4.7 per cent, but in 1992 and 1993 economic activity underwent a serious crisis and the growth rate was negative. In Tunisia, in the 1987-1992 period, the economy registered an average annual growth rate of 5 per cent, the rate was 2.9 per cent in 1993 and 2.1 per cent in 1994, whereas the Eighth Development Plan (1992-1996) had forecast 4 per cent and 6 per cent respectively for these years (Ministry of Economic Development, Tunis, 1994). In the 1985-1993 period, Algerian GDP registered an average annual growth of 0.6 per cent.

According to the international institutions, Morocco and Tunisia are already relatively advanced in the implementation of structural adjustment programmes. In the first completed phase, both countries made considerable progress in restoring financial equilibrium and in reducing the weaknesses of their economies. Structural reforms also helped to bring down inflation and budget deficits, and to improve equilibrium with external markets. The authorities must now improve the economic environment to promote growth, investment and employment creation. Algeria introduced certain macro-economic reforms, but much remains to be done in this country to increase the necessary investments and make them more effective, in order to revive growth.

3.4.4. Living standards of the population

Since independence, the Maghreb countries have succeeded in improving the living standards of their populations. National per capita income, in US dollars, increased steadily until the mid-eighties. From 1972 to 1983, it increased from \$ 2,170 to \$ 3,350 in Algeria, \$ 560 to \$ 700 in Morocco and \$ 870 to \$ 1,230 in Tunisia. Since then, however, these incomes have dropped or practically ceased to increase, and fluctuated under the effects of the economic crisis. Whereas the average annual per capita income growth rate during the 1972-1983 period was 4.2 per cent in Algeria, 2.3 per cent in Morocco and 3.3 per cent in Tunisia, we can see that between 1983 and 1992, the growth rate was negative for Algeria, +1.9 per cent for Morocco and + 1.1 per cent for Tunisia. Because of the sharp decrease registered in Algeria, per capita income in this country in 1992 corresponded to that of the mid-seventies. Even though control of inflation as led to improved living standards in real terms in Morocco and Tunisia, the constraints imposed by structural adjustment programmes have had the general effect of lowering living standards. This is due in particular to wage freezes and the reduction of public consumer subsidies.

Although GNP has evolved in general at a slower rate than population growth, undeniable progress has been made at social level, and more rapidly than expected, in view of the situation prevailing in the days following independence. Social indicators are particularly eloquent. In respect of health care, the number of doctors per inhabitant has increased and life expectancy at birth, which was 46 years in the sixties, is now over 60. Investment in education has reduced the illiteracy rate, which is at present 43 per cent in Algeria, 51 per cent in Morocco and 35 per cent in Tunisia. This last country, which has placed greater importance on social development, has made more rapid progress and presents social indicators that are higher than other developing countries with the same level of per capita income. The proportion of the population in a situation of extreme poverty has been reduced to 7 per cent in Morocco and 6 per cent in Tunisia (World Bank, 1995).

Significant though such progress may be, it should not hide from us the scale of unsatisfied needs and the welfare gap. In Algeria and Morocco, social indicators, such as the infant mortality rate or the rate of primary school attendance are still lower than those observed in countries with the same level of economic development. Throughout the entire Maghreb, school attendance levels among women are still very low. Despite progress made in the fight against poverty, this is still a major challenge, and the impoverished population, living mainly in rural areas, is still very large. The disparities between urban and rural areas, and between different social classes, remain considerable in respect of income and social well-being. This factor has a direct bearing on pressure to leave the land and to emigrate, as families see this as an opportunity to increase their incomes and give their children greater chances of success. In order to increase this social well-being, countries' economies need to achieve a growth rate that will make it possible to increase social investment. Public investment should, moreover, be primarily targeted at disadvantaged sectors and regions, in order for it to have an impact on the poorest sections of the population.

3.4.5. Urbanization

Urbanization is both a consequence of a country's economic development and a factor of socio-economic change. The distribution of the population over rural and urban areas, together with the tendency to move from one area to the other, has particularly significant effects on labour markets and migration pressure.

The countries of the Maghreb have been rapidly urbanized and this phenomenon is likely to be sustained. In the early nineties, the urban population accounted for 53 per cent of the total population in Algeria, 57 per cent in Morocco and 68 per cent in Tunisia. This urbanization, which represents a major drift from the land, means that, even if fertility rates are generally higher in rural areas, the urban population is increasing at a faster rate than the national average.

Rural exodus reflects inequalities in economic development between rural and urban areas since, in the former, real incomes are lower and employment opportunities fewer than in the latter. Disparities in social and health services, and in particular access to educational establishments, health care centres and the provision of clean drinking water, also contribute to the phenomenon of movement to the towns.

In the years when there was a high level of emigration flow, population growth rates in urban districts slowed down. In fact, the rural population emigrated directly out of the country instead of first seeking employment in the towns, and the movements of rural migrants to the towns were offset by the departure of urban population groups to other countries. However, internal migration from the country to the towns was itself at the origin of international migration flows, in view of the fact that populations that had come to settle in the towns, not finding work, could decide to emigrate.

When, in the seventies, the era of emigration had come to an end, individuals had no other choice than internal migration. Exodus from the country towards the towns, and from small and

medium towns to larger cities, added to high population growth rates, led to an increase in the urban active population and subjected urban labour markets to extreme pressure. This phenomenon revealed its seriousness especially during the crisis of the eighties and the stagnation of the employment market that accompanied it. The cities were unable to provide possibilities of economic absorption and social development for the new arrivals.

Migration flows, within a country or between countries, can be considered as starting off a process of equalizing wages. It is, therefore, implicitly admitted that migrations make a positive contribution to the country or the region of origin, by inducing a rise in wage rates as a result of the reduced labour supply after the departure of the migrants. Local workers, and the local population in general, thus gain from this improvement. In the Maghreb, the halt of flows to foreign countries and the persistence of flows towards the towns, despite the existence of urban under-employment, keep wage rates low. The high unemployment rate removes all possibility of improvement. These migration flows do not, therefore, result in an improvement in the labour market, since the phenomenon is not accompanied by a sufficient development of employment-creating activities (Mezdour, 1993).

New arrivals in the towns are for the most part young persons who have a higher level of education than the average in their areas of origin. Faced with the impossibility of finding employment in the structured sector, this workforce contributes to the increase in the number of precarious and under-paid jobs in the informal sector. The expansion of marginal employment and unemployment in the urban areas fuels socio-economic tensions in the countries concerned and increases emigration pressure. Moreover, local authorities may not wish to limit departures for abroad, hoping thus to reduce urban tensions. Urban development must be a priority, given its political, economic and social implications. However, if it is not to result in merely providing an increasingly stronger attraction for the population of the deprived areas, it must be offset by a regional development strategy.

At present, in the three Maghreb countries, but especially in Tunisia, there has been a decline of the attraction of the capital and an increased migration towards medium-sized towns. According to a survey conducted in Tunisia in 1991 (Ministry of Planning and Regional Development, Tunis, 1994), internal migration is assuming a family character with the greater involvement of women on the employment market. Furthermore, the past ten years have been characterized by a socio-economic situation in which the push factor in the rural regions of origin has progressively diminished, while the traditionally urban host regions have lost much of their attraction. These developments have come about in a context marked, on the one hand, by a virtual halt to emigration abroad and, on the other, by a certain regionalization and decentralization of economic areas and economic decision-making. The former has considerably reduced the role of the large urban centres as the first stopping places for potential emigrants. The latter has led to a proliferation of new urban centres, which are attracting an increasing proportion of the migration flow. These medium-sized towns have acted as buffers for internal and international migration, as they retain the rural surplus. If this phenomenon, so essential to reducing migration pressure, is to continue and last, it will have to be supported by sustained regional development.

3.4.6. Evolution of the sectoral employment structure

Over the past forty years, there have been major redistributions of the workforce between sectors (Table 8).

Global demand for agricultural labour diminished in the seventies and eighties. This was due, at least partly, to the fact that the terms of trade for agricultural goods had deteriorated under the combined effects of a fall in prices of imported agricultural goods and a government policy that consisted in artificially lowering the prices of agricultural consumer goods so as to subsidize urban consumers. Workers who left the agricultural sector were attracted mainly into the

construction sector, even though they often remained in contact with their previous sector of activity by engaging in seasonal work. In general, while it is still important in terms of workers employed, the agricultural sector has lost jobs and is no longer the principal employment sector. In Morocco as in Turkey, agricultural employment has steadily declined, but these countries have still a largely agricultural economy, as the sector employs about 40 per cent of the working population. In Algeria and Tunisia, employment in the agricultural sector has decreased by over two thirds, and it now provides work for only about 20 per cent of the active population. In recent years, we have witnessed a slowing-down in the decline of agricultural employment, if not a reversal of this tendency, as in the case of Algeria. This phenomenon is not, however, to be attributed to the reorganization and modernization of the sector, but rather to the crisis in the other sectors and to increased under-employment in agriculture. In the future, the agricultural sector will, in the most optimistic scenario, do no more than maintain its present level of employment and, even then, only with considerable under-employment. Nevertheless, in Morocco in particular, the agricultural sector represents a considerable reservoir of potential emigrants, who, given the characteristics of Moroccan immigrants in irregular situations in Spain and Italy, could easily opt for clandestine emigration.

Unlike development patterns in industrialized countries, in the Maghreb, it is to the services sector, rather than to industry, that the general shift in the active population has taken place. From the sixties onwards, the services represented the second largest employment sector: it is at present the largest sector in Algeria, employing 50 per cent of the active population, and in Tunisia, with 35 per cent. This premature tertiarization reflects the swelling number of public sector employees. At the end of the eighties, public administration, including education, health care and other public services, accounted for 25 per cent of total employment in Algeria, 15 per cent in Morocco and 17 per cent in Tunisia. These figures correspond to between 50 per cent and 60 per cent of employees in the entire services sector. With the conditions imposed by structural adjustment programmes, bearing in mind that strict limits have been placed on public service personnel numbers, this sector will no longer be able to absorb surplus workers as it did in the past.

As these countries develop, we see a parallel increase in industrial employment, which, in the eighties, accounted for 30 per cent of workers in Algeria, 25 per cent in Morocco and 30 per cent in Tunisia. Tunisia is the only Maghreb country where, from the late sixties onwards, industry was providing employment for a considerable proportion of the active population, with a maximum of 37 per cent - a higher percentage than for tertiary sector workers - towards the beginning of the eighties. In all these countries, including Tunisia, there has, however, been a decline or stabilization in the number of workers in this sector since the eighties. Under the conditions of structural adjustment programmes and the modernization of economies, the industrial sector has undergone personnel cutbacks with a view to obtaining the necessary productivity gains to maintain competitiveness with other countries. At the same time, especially in Morocco and Tunisia, there has been a decline in employment in the modern industrial sector, due to increased imports of manufactured goods, a phenomenon which will take on even greater dimensions with the establishment of free-trade zones with the European Union.

Employment in the informal sector has increased substantially over the last two decades, and at a faster rate than total employment. The spread of self-employment and family help in comparison with total national employment is an indication of the growth of employment in this sector in the countries under consideration. This sector, which has made it possible to absorb part of the increased supply of labour, especially in urban areas, has a shock-absorbing effect in periods of crisis and has mitigated the effects of structural adjustment. Employment in the informal sector, often carried on in the home and generally in family businesses or individual micro-enterprises, is difficult to evaluate statistically. Estimates suggest that it accounts for 26 per cent

of non-agricultural employment in Algeria, 36 per cent in Tunisia and might amount to 57 per cent in Morocco (Charmes, 1990).

The opening-up of the economy and the liberalization of trade could result in the long term in increased employment in the export sectors. In Morocco, it would appear that, since the early eighties, there has been a growth trend in rural agricultural employment with increased exports of agricultural and food products. In the short term, however, the absorption of labour, especially of new entrants onto the labour market, is likely to be effected in the informal sector, in jobs that are often of a seasonal or part-time nature. However, informal sector activity, especially in manufacturing, could decline as a result of competition from imported goods and, in any case, reach saturation point in its capacity for absorbing manpower.

To conclude, the evolution and present situation of the different sectors of employment lead us to the view that their capacity for employment creation will not be enough to meet the needs of new job seekers. This prompts us to advance relatively modest hypotheses concerning the creation of new jobs at national level for the 1995-2010 period, which, in our analysis, will contribute to the increase in the surplus labour supply, and this will have an impact on the phenomenon of migration pressure.

3.5. The effects of structural adjustment programmes

As a result of structural adjustment programmes, the countries affected hope to restore growth and attract direct foreign investments. While this is a long-term eventuality, in the short term the costs of adjustment, necessary though they may be, can be extremely high. In fact, governments are currently faced with a dilemma. They must, on the one hand, restructure the economy so as to ensure sustained and durable development, and, on the other hand, reduce poverty and arrest the fall of living standards, if they do not want to be politically penalized and prevented from pursuing reforms. In the face of these challenges, governments could opt for a slowing-down in the implementation of adjustment programmes, despite the possible negative economic effects.

3.5.1. Enterprise restructuring

In Tunisia and Morocco, under the conditions of structural adjustment programmes, a large number of small and medium-sized enterprises will have to disappear. Others will have to fight to survive the economic reforms adopted and foreign competition, and to this end they must undergo radical restructuring. This restructuring, the purpose of which is to improve the performance and productivity of these enterprises, so as to develop the private sector and attract foreign investment, will entail changes in the production management system, as well as personnel redeployment and redundancies. For the same reasons, but also in order to reduce public spending, privatization programmes affecting a large number of public enterprises are planned and already partially in the process of implementation. The enterprises that are to remain in the public sector will also be radically restructured.

Even though the Tunisian and Moroccan governments have adopted measures to support certain enterprises, with a view to restructuring and rehabilitating them, the crisis will be serious and the hardest hit sectors will be farm-produce and engineering, electrical goods and textiles, ceramics, glass and construction materials.

3.5.2. Commercial strategy

With trade liberalization, currency depreciation and the progressive lifting of import restrictions, the authorities in Morocco and Tunisia now wish to give their economy an outward

orientation and remove it from government control. The opening-up to international trade has direct implications at internal and external level. In the first place, enterprises geared to the international market will have to keep production costs down and increase their productivity in order to stand up to competition from imported goods. At international level, and if this policy is to bear fruit in respect of development, enterprises must be capable of conquering and increasing their share of the world market in the face of competition from other producers. To this end, enterprises will increasingly specialize, and this should improve their competitiveness, as well as their productivity and product quality.

Traditionally, the Maghreb countries export three types of goods. Food products (citrus fruits, early fruit and vegetables, olive oil, etc.), phosphates (raw or processed) and hydrocarbons. In the seventies, Tunisian exports seemed to be the most diversified, with manufactured goods occupying an important place. From the early eighties onwards, Tunisia and Morocco diversified their exports, with increased exports of manufactured goods, mainly clothing and leather goods. According to statistics, between 1980 and 1993, the percentage of exports of manufactured goods rose from 38 per cent to 78 per cent in Tunisia and from 16 per cent to 40 in Morocco. Exports of farm produce are still considerable, however, especially in Morocco where they represented 29 per cent of total exports in 1993. By comparison, exports of manufactured goods from Algeria represented 1.7 per cent of total exports in value in 1993, while in Turkey, between 1980 and 1993, exports of manufactured goods and textiles rose from 53 per cent to 82 per cent of total exports (World Bank, 1994).

While in the eighties Moroccan and Tunisian exports rose fairly rapidly, since the beginning of the nineties they have not managed to increase as much as expected, and export earnings have even diminished as a result of the fall in prices and in export volume. Moreover, while the value of imports has always been higher than that of exports, at present there has even been increased growth in imports.

In respect of production for export, Morocco has a comparative advantage in commodities such as raw phosphates and fertilizers, as well as in agricultural and food products (fruit, vegetables, olive oil), fish and manufactured goods. As for Tunisia, its international comparative advantage concerns products associated with the oil and phosphates industries, processed fertilizers and chemicals, agricultural produce, olive oil, as well as manufactured goods. The advantages would obviously be greater if these countries managed to develop the upstream manufacturing sector.

Indeed, for the moment, the policy of industrialization though the promotion of exports is still very fragile, a weakness which, for Tunisia and Morocco, is the consequence of the fact that producer goods and machinery are imported. Furthermore, Morocco also has to import the hydrocarbons necessary for domestic consumption.

The situation would improve in the event of an inter-Maghreb agreement which would make it possible to enlarge markets, increase the size of enterprises and reduce production costs. Even though the countries under consideration, especially Tunisia and Morocco, are often in competition in their manufacturing production, they could make greater use of the possibilities of economies of scale if they increased their outlets. An agreement of this kind would also facilitate hydrocarbon imports for Morocco and reduce the Algerian budget deficit for imports of food and manufactured goods. Discussions have been in progress for some time concerning the establishment of a common market at Arab Maghreb Union level, but the completion of this agreement has been delayed by political divergences.

3.5.3. Investment

Economic development and the expansion of new export-oriented industries require increased investment, in particular direct foreign investment. However, results up to the present

have fallen short of expectations, despite the economic measures applied to encourage investment and despite the incentive policy implicit in the liberalization of direct foreign investments in 1989 in Morocco, and in 1993 in Tunisia.

In the eighties, given that the adjustment measures prevented the countries from using international credit to finance their investments, the application of these programmes gave rise to a disinvestment process. This situation, added to the slowing-down of foreign capital entries in the form of direct investments, led in Morocco to a negative average annual growth rate during the first half of the eighties. From 1986 onwards, in Morocco and Tunisia, direct foreign investment, mainly from the European Union, increased again, even though the figures have been modest. Together, the two countries received during the 1986-1990 period, less than 3 per cent of net European direct investment in developing countries (Tapinos, 1994).

In Tunisia, the available figures on investments have shown a downward tendency since 1990. Declarations of intent to invest made to the Industrial Promotion Agency registered a serious decline in 1992 and 1993. This decline concerned mainly the textile and leather goods sectors and the engineering and electrical industries. It should be pointed out that this trend has affected export-oriented projects as well as others. Moreover, bank reports have revealed that promoters continue to turn to the tourism and services sectors, whereas the manufacturing industries have registered a decline. Direct foreign investments have also fallen short of expectations, especially in the manufacturing industries.

It would appear that foreign investors aiming at internal markets have been discouraged by the narrowness of the Maghreb countries taken individually, and are more attracted by Eastern European and Asian markets, which are larger and potentially more conducive to expansion. Investors aiming at external markets could also be put off by the constraints of the North African employment market.

3.5.4. Impact on the employment market

Structural adjustment programmes have had and will continue to have an impact on the employment market. Since the mid-eighties, because of structural reforms and the sharp fall in economic activity, labour markets have declined as a result of restrictions and cut-backs affecting employment in the public sector and in administration, and of the inability of private enterprises to take over from them.

As regards the public sector, administration and services, budget imbalances, which had become intolerable in the eighties, led governments, especially in Morocco and Tunisia, to freeze recruitment and wages. Given the traditional role of this sector in the absorption of surplus labour, the halt in the creation of new posts has affected young graduates above all, as we have already shown in our comments on unemployment. In respect of other sectors of the economy, these countries will still have to go through a period marked by lay-offs in private or recently privatized enterprises. Moreover, the need to improve labour productivity and the application of new production techniques will lead to a reduction of labour intensity in many sectors of activity.

In the agricultural sector, the modernization measures necessary to increased productivity and exports, are very likely to lead to job losses and a decrease in the phenomenon of under-employment, which, in spite of its negative aspects, enabled a considerable proportion of the population to survive in rural areas. As we have already pointed out, this phenomenon, especially serious in Morocco, could give rise to a major drift from the land, which would have an effect on emigration.

Conversely, as regards the positive aspect, measures to open up the economy could be reflected in the long term by increased employment in the manufacturing and food industries producing for export and using a high proportion of unskilled labour. However, in the short term, trade liberalization, increased imports and structural changes would appear more likely to be

reflected in an increased labour surplus at national level and higher unemployment levels. This situation could also intensify migration pressure. Its impact could be partially attenuated if liberalization were to be accompanied by employment protection measures. However, only an increase in the volume of foreign investment in labour-intensive sectors can have an appreciable positive impact on the employment market.

3.5.5. Incomes

Since the seventies, we have witnessed a narrowing of wage differentials and a decline in poverty in Morocco and Tunisia (Morrisson, 1991; Saleh, Nsouli, Eken, Duran, Bell, Yücelik, 1993). The lowest wages in rural areas have increased, while real wages have fallen in the towns, especially in the industrial and administration sectors. In the eighties, income trends were satisfactory in the agricultural sector, thanks partly to favourable climatic conditions which benefited this sector of activity. Urban incomes, in both private and public sectors, stagnated, and skilled workers registered the greatest drop in earnings.

Increased unemployment and under-employment, wage freezes and the discontinuation of consumer subsidies will lower the living standards of the population in the three countries of the Maghreb. The study conducted by Morrisson on Morocco concludes, however, that without adjustment, the economic crisis would have led to a far more serious increase in poverty (Morrisson, 1991). It would therefore appear that, as a result of adjustment, the country has had to pay lower social costs than if it had rejected the World Bank plan. Despite the existence of measures designed to reduce the impact of structural adjustment programmes on the poorer segments of the population, these countries will be subjected to considerable social tensions. In particular, this crisis situation could be reflected in urban areas by emigration pressure among young graduates who are unemployed or who refuse to work for low wages, or among persons who, though they have a job, are disillusioned by their economic prospects.

3.5.6. Production and labour costs

Since the opening-up of markets, the amount of direct foreign investment has fallen short of expectations, partly due to the fact that production costs in the Maghreb are higher than in other competing countries. In particular the policy oriented to the export of labour-intensive manufactured goods is seriously threatened by the fact that the unit costs of labour are relatively high (Tapinos, 1994).

In the Maghreb as a whole, wages in the formal sectors are, in certain cases, higher than those of competing countries, and, if we consider the price of labour in relation to its productivity, labour costs are sometimes higher still. This problem presents itself in particular in Tunisia, where wages are higher than in other countries in the region. The proximity of the European export markets of Maghreb products does not compensate for this factor, since transport costs in the Mediterranean area are still quite high.

For goods produced in the Maghreb to be competitive on international markets, but also in the interest of attracting foreign investment, labour costs must therefore be kept as low as possible. This phenomenon will affect the living standard of the population and the propensity of individuals to emigrate. For enterprises, one of the means of reducing labour costs consists in having greater recourse to women workers.

3.5.7. Consequences for women's work

Export strategies and the determination to develop activities for which the Maghreb countries have comparative advantages at international level encourage the development of labour-

intensive activities in the manufacturing sector. This sector, especially as regards textiles, food-processing and electrical and electronic components, is very prone to have recourse to female labour. In Tunisia, for example, the rapid increase in the number of women in employment must be attributed to the development of the textile industry. Women's activity might therefore increase at a faster rate than expected in the very likely event of international specialization based on the development of these activities. While the female population represents a major labour reserve, the enormous demand for this labour, bearing in mind the very high male unemployment rate and the effect that such a demand might have in respect of replacing male with female workers, could give rise to social conflict. Contributing to the emergence of such conflicts in a period of crisis is the fact that the transformation of the role of women, from wife and mother to producer, would be so rapid that these societies would not have had the time to adapt to them psychologically.

That being the case, planners will find themselves faced with a social and economic choice. With a shortage of jobs, they could decide to give priority to men in respect of employment, but faced with economic necessities, they will be obliged to yield to the increased demand for female labour. Bearing in mind that potential emigrants are for the most part young men, the expansion of this phenomenon could have the indirect effect of increasing migration pressure. Unfortunately, our analysis of migration pressure only concerns the global level of the active population and does not allow us to examine the diversification of the phenomenon according to sex. However, even if we cannot draw direct conclusions based on the application of our model, it is important to give this phenomenon greater consideration when formulating co-operation programmes.

3.6. Effects of new free-trade agreements between the Maghreb and the European Union ¹¹

The external trade of the Maghreb countries is to a large extent conducted with Europe. In 1992, Tunisia's European partners accounted for more than 78 per cent of its exports and 71 per cent of its imports. In Algeria, 63 per cent of imports and 73 per cent of exports were effected with countries of the European Union. Conversely, the proportion of EU exports to the Maghreb countries represents less than 1 per cent (United Nations, 1992/1993). However, the countries of the European Union depend to a large extent on the Maghreb for their energy supplies. Despite the recommendations of international trade organizations, Algeria, Morocco and Tunisia have not succeeded in diversifying their trade relations outside Europe, and enterprises in the Maghreb are still for the most part oriented towards the same outlets. The new free-trade agreements signed with the EU by Morocco and Tunisia will not encourage the desired diversification, and this phenomenon of dependence makes the Maghreb economy particularly vulnerable to external shocks coming from Europe.

Because of this situation of preferential relations with the countries of the European Union, within the framework of structural adjustment programmes and the economic liberalization of the Maghreb countries, the free-trade agreements with the EU countries are seen by the Maghreb countries as a necessity, which should enable them to enter into the system of trade globalization. These agreements, in fact, represent a logical complement to the implementation of structural adjustment programmes. The difficult situation to which they give rise is in keeping with the entire process of present trade liberalization policy.

These agreements define the creation of a free-trade zone, which should be established progressively over a period of twelve years. The preferential system currently applied by the

¹¹ Euro-Mediterranean agreements establishing an association between the European Communities and their Member States and Tunisia, (COM (95) 235 final. Euro-Mediterranean agreements establishing an association between the European Communities and their Member States and Morocco.

European Union in respect of products from the Maghreb and Turkey, which has resulted in its completely opening up its market to Maghreb exports of industrial goods and in concessions in the case of most agricultural products, is thus consolidated. An improvement in this system is envisaged for agricultural and fishery products, but also as regards the reference quantities for the duty-free import of certain products into the European Union and for customs duties outside these reference quantities.

With the progressive implementation of these agreements, North African enterprises will be able to use to the full their comparative advantages over their European competitors, thanks to lower labour costs. It would therefore be in the interests of the Maghreb countries to specialize in labour-intensive sectors and increase their exports to the EU market, which is protected in respect of other countries.

While these agreements and the proximity of their markets should encourage the expansion of production in the Maghreb and Turkey, and even the relocation of European enterprises to these regions, care must still be taken not to underestimate the competition of production in Asia, Eastern Europe and other Mediterranean countries. EU markets will also gradually open up to imports from Eastern Europe and other Mediterranean countries, under the terms of preferential agreements, and to imports from Asia with the application of the provisions of GATT. Moreover, in the very sensitive textiles sector, with the expiry of the Multi-Fibre Arrangements, the Maghreb countries will lose their favoured status in relation to other regions. Competition from these other regions is important since, as we have already said, their production and, above all, their labour costs are often even lower than in the Maghreb countries. Enterprises in these countries can increase their exports and attract direct foreign investment only by improving their productivity and commercial networks. The entire region will have to maintain a particularly favourable political and economic climate.

We would also point out that, while in the eighties exports of manufactured clothing and leather goods from the Maghreb countries had managed to increase their share of the European market, they seem to have been losing shares since the early nineties, as a result of competition from Eastern Europe and Asia, but also from Turkey, Egypt and Israel. In the past, under the terms of earlier trade agreements, the Maghreb countries did not always succeed in filling their export quotas to the EU and in taking full and concrete advantage of the trade concessions. This problem will be repeated under the terms of the new agreements unless production and export expansion strategy comes up to expectations.

Within the framework of the free-trade agreements, trade liberalization will be reciprocal and, therefore, the countries of the Maghreb, which up to now have granted no concessions to the EU countries, will progressively remove obstacles to the import of industrial goods from these countries and apply preferential rights to imports of their agricultural products. Apart from tax revenue losses, the application of these provisions will oblige existing enterprises in the Maghreb to face competition from European products. Finally, the creation of new national production will no longer be facilitated by protection in the markets of the countries concerned.

Bearing all these factors in mind, free trade could have adverse effects, which were not taken into consideration during the negotiations. This opening-up to free trade could, in fact, result in increased imports to the Maghreb, a deterioration in the balance of trade, a need for additional efforts on the part of national economies to limit public spending, and a decline in living standards (Tapinos, 1994). This situation, which would tend to aggravate internal and external imbalances, could have as a consequence a calling into question of the consolidation of economies in the first phase of the structural adjustment programmes. This free trade could therefore also lead not only to reduced wages, but also to a decline in employment growth in the modern urban service industries geared to the internal market. Consequently, this free trade zone could ultimately not provide a substitution to migration but, conversely, contribute to an increase in migration pressure.

However, despite these negative aspects, the opening-up of the Maghreb market to European enterprises and the liberalization of trade in the region are necessary conditions for encouraging foreign investment. It is only in the long term, and if the creation of a free-trade zone succeeds in attracting investment and in encouraging sustained economic expansion, that such a measure could be considered likely to create other alternatives to emigration.

The question that now arises is that of knowing how long the possible negative effects of trade liberalization will make themselves felt, and of how to guarantee, at least in the medium term, that there will be an economic take-off capable of creating a sufficient number of jobs to meet national needs. The entire process depends on the capacity to attract foreign investment and the relocation of European enterprises. Targeted co-operation or trade-liberalization measures can only be support actions to investment projects which should be carried out by private industrialists, and they should, under no circumstances, be considered as a substitute for these projects. Ultimately, it is the arrival of foreign capital and the relocation of European enterprises that will be able to generate sustained economic growth and, consequently, provide elements allowing for alternatives to emigration, not targeted co-operation measures or trade liberalization on their own.

3.7. Scenarios of labour demand growth

As we said earlier, if economic growth continues at the same rate in the coming years as at present, employment creation will not be sufficient and will be able to absorb only part of the additional labour supply. Moreover, there would have to be a very favourable economic situation for the surplus labour to be absorbed by the national markets in the Maghreb countries. Forecasts are pessimistic as to economic growth and investments necessary in order to make these economies capable of creating an additional demand for labour, sufficient, at least, to keep unemployment at its present level, if not to reduce it. In fact, to guarantee the necessary employment creation up to the beginning of the next century, Maghreb economies would have to grow at an annual rate of over 7 per cent. To cope with the additions to the labour force alone, the Maghreb countries as a whole would need to create about 10 million new jobs during the 1995-2010 period. This objective appears difficult to attain, bearing in mind that this figure corresponds more or less to the total employed population in 1982.

In the chapter on the active population (Chapter 3.3.), we evaluated the supply of labour for the past years and worked out scenarios concerning the growth of the labour supply for the 1995-2010 period. In this chapter, we must establish scenarios concerning the demand for labour over the same period. A glance at these different scenarios will enable us, in the chapter on the prospective study of migration pressure, to determine the flows of surplus labour in relation to the national demand and to measure migration pressure.

The methodology observed in the first part of the study does not use the concept of modification of labour supply. It is the dynamic of the labour market seen from the point of view of the flows of its various components which justifies our analysis and our application to the case of the Maghreb countries and Turkey. To measure demand for labour in terms of flow, we shall break down this demand into *additional demand* and *replacement demand*. The additional demand represents the creation of new jobs, whereas the replacement demand is the demand geared to replacing persons who have retired.

This latter component of the labour demand - *the replacement demand* - can be calculated on the basis of demographic data. The *additional demand* corresponds to the variation in the stock of employed persons and measures the number of newly employed as a result of the creation of new jobs. The scenarios that we establish in this chapter refer to this employment component.

The level of the demand for labour is influenced by several factors. One of the most important of these is the volume of goods and services produced. Other important factors include,

for example, the availability of sufficient resources for investment and the extent to which macro-economic, institutional and other policies influence economic revival or, conversely, slow it down. The composition of the global demand for goods also affects the labour market as the workforce needed in their manufacture will depend on the type of product (ILO, 1994).

The uncertainty of the international and national context, as well as the trend towards job losses which characterizes the present period, makes any attempt to make forecasts for the Maghreb and Turkey very risky, and estimates are not very reliable even for the relatively immediate future. The employment rate cannot be foreseen with any certainty for the 1995-2010 period with which we are concerned, and we can only infer it on the basis of scenarios. These scenarios relating to employment growth are based on the entire series of conclusions of the preceding chapters concerning economic development and the effects of the process of opening-up to the global market.

As far as employment creation (*additional demand*) is concerned, and for the purpose of our analysis, we shall consider two hypotheses of growth, a minimum and a maximum. We shall subdivide the period under review, 1995-2010, into three five-year periods. The employment growth rate will be 5 per cent per period in the minimum growth scenario, and 10 per cent in the maximum growth scenario. We consider these growth rates, which have been chosen on the basis of an analysis of earlier developments, to be realistic hypotheses, given the present state of the economy in these countries and the trends on their employment markets, subject as they are to the constraints of adjustment.

It is difficult for us to determine the GDP growth rate that should correspond to these employment growth rates on the basis of an analysis of earlier trends in the relationship between the two growth rates. This is made more difficult by the changes that have occurred in the economies of the Maghreb countries: the halt to development geared to heavy industry, the development of the manufacturing industries, and the implementation of enterprise management restructuring measures so as to increase productivity. These changes will, in fact, have an impact on the relations between the growth rates.

3.8. Other factors of migration pressure

3.8.1. Socio-political variables

Factors characterizing the social and political climate have a general impact on the quality of life in the countries concerned and therefore, indirectly, on the tendency of the population to emigrate. Causalities associated with these factors might affect migration pressure regardless of economic or demographic trends.

Among the elements that have to be taken into consideration, we would mention existing social welfare and health infrastructures, as well as the availability of housing. Like young Italians, young North Africans are often unable to marry and raise a family because of the lack of housing, or its very high cost. While housing shortages prevent young people from starting a family and becoming socially integrated in the country, deficiencies in respect of social welfare, health care and educational infrastructures may drive young couples with children to migrate with a view to providing their offspring with a more propitious environment.

Political instability or a climate of insecurity in society can not only drive individuals to emigrate but also encourage governments to adopt a benign attitude towards the departure of individuals dissatisfied with their lot, as such persons could cause social unrest.

Thus, we should not underestimate the importance of politics and government attitudes when considering the subject of emigration. Even though, officially, the flows of labour have stopped and in the interest of smooth diplomatic relations governments declare themselves willing to combat clandestine emigration, the reality may be quite different. For the emigration countries,

indeed, it is essential, on the one hand, that repatriation of emigrants' wages should not diminish and, on the other hand, that social and labour market tensions should be kept under control.

The socio-cultural discrepancies between individual aspirations and the actual situation in a country creates conditions that lead to emigration. Improved schooling, the rapid increase in exchanges and information, and the opening on to the world through the media are reflected in the emergence of new social and cultural aspirations among the younger generations. These young persons have the feeling that their aspirations cannot be satisfied in their own country. Potential emigrants desire to leave not only with a view to financial gain but also in order to attain a different lifestyle.

3.8.2. Inequitable distribution of well-being within a country

In respect of distribution of the national income and social well-being, there are still considerable disparities between the rural and urban worlds and between the different social classes. Up to the end of the eighties, the tax system in Tunisia and Morocco was such that it created distortions and was unfair. The reforms in this field, which were introduced under the terms of structural adjustment aim at greater equity.

As we mentioned in the section devoted to urbanization, inequalities between districts in one and the same country, in respect of the earnings of the population and of social and health services, add to the pressure towards urbanization and this also to the propensity of the population to emigrate. In Morocco and Tunisia, since the eighties, the lowest wages - those earned in rural areas - have increased, whereas real wages have remained the same in the towns. Consequently, at national level, there is a decline in the proportion of the population in a situation of extreme poverty and a contraction of the wage range.

The absence of adequate health care and educational infrastructures in certain regions can give rise to internal migration. The rate of departures towards the cities or abroad is higher in the economically deprived areas, which, among other things, show indicators of health and education that are lower than the national average.

3.8.3. Environmental deterioration

Desertification, soil erosion and water shortage seriously affect agricultural populations and are potential causes of population displacements. Even if it is not an environmental disaster that drives people to leave precipitately, environmental degradation can be the cause of departure for economic reasons. The Maghreb is a region particularly exposed to this hazard, bearing in mind that strong demographic pressures prevail in a fragile environment and that over-exploitation of the land reduces agricultural yields.

Among all problems we must also take the question of water into account. The exploitation of the water tables makes it possible at present to envisage the development of intensive irrigation farming, and the subsequent expansion of the tourist trade, which consumes large quantities of water. However, estimates of water availability from these water tables are very pessimistic for the coming decades and, lacking other solutions, this phenomenon could cast doubt on the entire process of development in the countries concerned and give rise to major migration pressures.

4. Prospective study of migration pressure¹²

4.1. Introduction

To conduct a prospective survey of migration pressure, we must first give a practical definition of certain concepts that we have already used and establish their analytical meaning. The representation of the employment market in terms of flow allows us to infer definitions and apply them to concrete situations. Our object is to determine the relative role of labour supply and demand and to isolate, in respect of supply, the weight of the demographic factor.

Basing ourselves on this model, we hope to bring to light the imbalance that exists between the need for jobs and the capacity of the economy to create them, and to predict the scale of the employment problems that will arise in the future. We shall base ourselves on the surplus workforce in relation to the demand for labour in a given country, in order to have an index of labour market imbalance, even if it is true that persons without work are not the only potential emigrants. It also concerns those that have work but still choose to emigrate.

Migration potential, defined as the surplus workforce in a closed economy and at a given time, reflects the inability of a country to provide a sufficient number of jobs. However, in the situation of an open economy, there will be a flow of emigrant labour only if individuals choose to emigrate. Its level will be shown by propensity to emigrate.

We shall apply our model to the case of labour markets in the Maghreb countries and Turkey. The period covered in the tables stretches from 1950 to 2010, but in the analysis, because of the problem of data, we are able to examine the development of the employment market situation only from the sixties or seventies onwards. It will be interesting to take into consideration the historical evolution of employment disequilibrium in the different countries and also to draw comparisons between them. As regards the prospective part, from the present until 2010, the analysis will be based on two scenarios of migration pressure, one low and the other high. Bearing in mind the quantitative and qualitative deficiencies of the statistical data available on the countries under examination, these applications are only partially valid, and the exercise will have to be considered as a tentative estimate.

4.2. The model

The model is intended to represent the operation of the labour market in terms of flow. The individual as labour supply is placed in the centre of our analysis and is considered in the three different stages of life: the phase of inactivity and training, the active life phase, and the phase of the end of active life and retirement. In this analysis, the role of demographic phenomena must be placed in the foreground. This model will allow us to bring out possible imbalances between the flows that can be observed in the labour market, first, in a closed market and, second, in a labour market open to outside. The model is based on the analysis of flows that occurred during given periods, which, in our application, are periods of five years.

4.2.1. The working-age population

In each period, the stock of the working-age population can be calculated as the total number of individuals that made up this stock during the previous period with the balance of

¹² The model and its application presented in this chapter rely on the analysis conducted by Bruni M. and Venturini A.: "Migration pressure and propensity to emigrate: the case of the Mediterranean Basin", *International Labour Review*, Vol. 134, No. 3 (ILO, 1995). Certain modifications made to this model here are the responsibility of the author of this study.

entries and departures during the period under consideration (Bruni, Franciosi, 1981). The balance - difference between entries and departures - measures the variation of the stock. In terms of flow, the working-age population is determined by the number of persons who, during the period under consideration, entered into the 15-64 year age-group, which constitutes the working-age population. As we saw earlier, the characteristics of this category are determined by the evolution of the volume and structure of the total population.

4.2.2. The active population

The active population represents the supply of labour. As in the case of the working-age population, in each period, the labour supply stock can be expressed as the addition of the number of individuals that already made up this stock during the previous period and the balance of entries and departures during the period under consideration. In terms of flow, this supply (**FS**) comprises the number of individuals who entered into the active population for the first time during the period under consideration. As we saw earlier, while the principal factor determining the active population is demographic - flows in the working-age population - this category is also determined by socio-economic factors that influence the will of individuals to participate in active life, as well as by their appraisal of their chances of finding a job. To indicate that we want to represent potential entries into the active population, we shall use the term **FS***.

4.2.3. The employed population

The additions to the employed population, and thus the number of persons who find a job within a given interval, are constituted by the demand for labour in terms of flow (**FD**). These flows are equal to the sum, on the one hand, of the variations in the number of jobs available and, on the other hand, entries into the employed population of individuals intended to replace others who have left it definitively (Bruni, 1988). We must also include in these entry flows the difference between the number of persons who temporarily leave the employed population and those who return to it after a period of unemployment or inactivity, or after a period spent out of the country.

The variation in the number of jobs available represents the additional demand (**DA**). This component, determined by the variation in the demand for labour and therefore by the elimination or creation of jobs, is by nature temporary and depends on the country's economic development, production growth and technical progress. Unlike the demographic factor, which has long-term effects on the supply of labour, the factors affecting the determination of additional demand can have a very short-term impact.

The number of entries into the employed population of individuals replacing those who have left this category definitively makes up the replacement demand (**DR**). This demand is dependent on a set of variables: demographic (age structure of the population); natural (life expectancy); and legislative (evolution of the statutory retirement age and the legal regulations governing it).

The difference between temporary departures from employment and temporary returns to employment represents the temporary balance (**ST**). In terms of flow, the demand for labour (**FD**) can therefore be expressed as:

$$FD = DA + DR + ST$$

The temporary balance (**ST**) will depend above all on the length of the interval considered, and its role is reduced to a minimum when the model stretches over a long period. Given that its

role is minimized in the case of our model, we can ignore this variable without great risk to its accuracy (Bruni, 1988). The equation can thus be written:

$$FD = DA + DR$$

4.2.4. The equilibrium situation in a closed labour market

Over a given period, a closed labour market will present a state of equilibrium in terms of flow, if the number of individuals who enter for the first time into the potentially active population (**FS***) is equal to the number of those who obtain employment for the first time (**FD**)

$$FS^* = FD, \text{ and therefore } FS^* = DA + DR$$

In terms of additional demand, given that we wish to refer to additional equilibrium demand (we shall express it as **DA***, the equation becomes:

$$DA^* = FS^* - DR$$

This means that the equilibrium of flows on a closed labour market will be reached if the market creates a number of additional jobs that is equal to the difference between the number that enter into the active population for the first time and the number of those who leave employment definitively. If there is a certain level of unemployment in the country, the equilibrium situation implies that the total unemployment rate remains constant, even if its composition may vary.

4.2.5. Migration potential¹³

In the situation of a closed economy, if the employment market in terms of flow is not balanced, there will be migration potential. Over a given period, the migration potential concerns labour that is surplus to national requirements. We are dealing here with the situation of country closed to migration flows and this migration potential represents the surplus in relation to the supply of labour. We shall be speaking, however, of an absolute surplus in the situation of a country open to migration.

If the equilibrium situation is represented by $FS^* = FD$, one of the two situations of non-equilibrium, in which the supply of labour in terms of flow is greater than the demand for labour, is represented, at a given moment and in a closed economy, by:

$$FS^* > FD \text{ and } FS^* > (DA + DR)$$

The migration potential (**PM**) is equal to the difference between potential entries into the active population (**FS***) and the number of those who succeed in obtaining their first job (**FD**):

$$PM = FS^* - FD, \text{ and } PM = FS^* - (DA + DR)$$

In a situation of equilibrium we have $PM = 0$. In a situation of non-equilibrium we have $PM > 0$ or $PM < 0$. The non-equilibrium situation that we have examined is the one where $PM > 0$.

¹³ See also Chapters 2.5.1 and 5.1.2.

The migration potential therefore corresponds to the potential surplus supply expressed in terms of flow. This surplus supply of labour does not necessarily correspond to the active population seeking employment, since this (potential) surplus also includes all individuals who are, at a given moment, structurally discouraged.

In terms of additional demand (DA) in a state of non-equilibrium, when the country has a relative surplus supply of labour, the actual additional demand is less than the additional equilibrium demand (DA*):

$$DA < DA^*, \text{ therefore } DA < (FS^* - DR)$$

If we are in a situation of non-equilibrium in terms of flow, in which the migration potential is positive, this surplus will contribute to an increase in the numbers of potential migrants, which constitute the migration potential in terms of stock. However, the relative surplus supply of labour (**PM**), given the situation of a closed economy, may yet be absorbed, at least in part, by the demand for foreign labour outside.

4.2.6. Effective migration¹⁴

Let us now examine the situation of a country that is open to migration. The labour market might present migration outflows of persons of working age, who will then enter into the active population of another country.

These effective migration flows (**ME**) will be composed of persons who enter the active population of another country legally or illegally.

$$ME = (\text{legal}) ME + (\text{illegal}) ME$$

4.2.7. Propensity to emigrate¹⁵

Migration potential (**PM**) is not transformed into migration flows unless there is a propensity to emigrate (E). Propensity to emigrate is a function of economic and non-economic variables which influence the choice of individuals and communities. Migration flows (ME) from a country (j) to other countries will be equal to the migration potential (PM) of country j multiplied by the propensity of country j nationals to emigrate to a given destination:

$$ME (j) = E (j) PM (j)$$

If the PM is positive but the propensity to emigrate is nil, there will be no emigration flow.

¹⁴ See also Chapter 2.5.2.

¹⁵ See also Chapter 2.5.1.

As we have said, propensity to emigrate (E) is determined at macro-economic level by the desire of individuals to leave their country. Our model does not analyse the factors that influence the manifestation of this phenomenon at individual level, even though we consider it to be the determining element in the constitution of the flows. However, on the basis of our model, we measure this propensity to emigrate (E) in terms of flow in a given period, as the relation between effective emigration (which includes legal and illegal emigration) and the relative surplus supply of labour (migration potential PM):

$$E = ME/PM$$

According to our definition, propensity to emigrate makes it possible to evaluate the extent to which a country's relative surplus supply of labour (PM), determined by local labour supply and demand, is directed and absorbed by the market in other countries. Seen from another angle, we can state that the relationship that expresses propensity to emigrate indicates the extent to which a country depends on migration to deploy its national labour supply. In a case where $E = 1$, we have $ME = PM$. Thus, all the migration potential is absorbed abroad and emigration guarantees the local labour market a situation of equilibrium in terms of flow.

In a case where $E < 1$, we have $ME < PM$. The migration potential, in terms of flow and in a given period, is only partially absorbed by other countries. In this case, the country will register an increase in its migration potential in terms of stock.

4.2.8. The equilibrium situation in an open labour market

If, in the situation of a closed market, the demand for labour were:

$$FD = DA + DR$$

in an open labour market, to take into account all labour requirements, this equation would become:

$$FD = (DA + DR) + ME$$

Whereas, in the situation of a closed market, equilibrium in terms of flow between the potentially active population (FS^*) and the number of those who obtain a job for the first time (FD) was expressed by:

$$FS^* = DA + DR$$

in an open market, the workforce-flow equilibrium would require that:

$$FS^* = DA + DR + ME, \text{ and therefore } (DA + Me)^* = FS^* - DR$$

This shows us that in a situation of equilibrium (indicated by *), total additional demand together with the number of migrants among persons of working age must correspond, on a national scale, to the difference between potential entries into the active population and definitive departures.

The last equation shows us that a country where the number of potential entries into the labour supply exceeds that of definitive departures from employment ($FS^* > DR$) has greater possibilities of seeing to it that the labour market remains in equilibrium or of preventing it from deteriorating: additional demand and emigration.

4.2.9. Absolute surplus supply of labour

In an open economy, the labour market is not in equilibrium if there is an absolute surplus of labour. Over a given period and in terms of flow, this absolute surplus refers to a supply of labour exceeding national needs plus the demand in the foreign market.

We have seen that in a closed economy one of the situations of non-equilibrium in the flows was expressed by $FS^* > FD$. In an open market, the same situation of non-equilibrium at a given moment is represented by:

$$FS^* > FD + ME$$

On the basis of this disequilibrium, we can arrive at a definition of the absolute surplus of the labour supply (**ExA**). The absolute labour supply surplus (**ExA**) is equal to the difference between potential entries into the active population (FS^*) and the number of those who succeed in obtaining their first job on the national market (FD) or in another country (ME):

$$ExA = FS^* - (FD + ME)$$

In terms of additional demand (DA), in a closed market in a situation of non-equilibrium, we see that $DA < DA^*$ and therefore $FS^* > (DA + DR)$. In an open market, where the country consequently has an absolute labour supply surplus, the effective additional demand, which is less than the additional equilibrium demand, will be represented by:

$$(DA + ME) < (DA + ME)^* \text{ and } FS^* > (DA + DR + ME)$$

On the basis of the definition of ExA, and knowing that $FD = DA + DR$, we see that:

$$ExA = FS^* - (DA + DR + ME)$$

We can also express ExA as a function of PM knowing that $PM = FS^* - (DA + DR)$, and consequently:

$$ExA = (PM - ME)$$

The absolute surplus labour supply thus represents the relative surplus (PM) which is not absorbed by the external market (ME). In a situation of equilibrium in an open market, we see that $ExA = 0$, whereas in one of the two situations of non-equilibrium in the same market we have $ExA > 0$. If the absolute surplus of labour supply is positive, this means that the migration potential in terms of flow has not been completely absorbed by the foreign market and that therefore $(PM - ME) > 0$.

Given that we are here in an open economy, this surplus can no longer be absorbed at a later stage by the demand for foreign labour and, in a given period, this surplus in terms of flow will increase the number of potential migrants (in terms of stock).

4.2.10. Migration pressure¹⁶

The definitions given above lead us to the concept of potential migration pressure. *In terms of flow, this potential pressure, in a given period, is understood as the absolute labour surplus (ExA) and the flows of illegal migrants corresponding to the same period.*

$$\text{Migration pressure} = ExA + ME \text{ (illegal)}$$

This therefore represents, in relation to the national and foreign demand for labour, the number of individuals who, in a given period, are in the country's territory but are potentially migrants, to which are added those who are already in the emigration country and work there illegally.

This migration pressure can be expressed in terms of migration potential (PM). Given the definition of absolute labour surplus (ExA):

$$ExA = (PM - ME)$$

and the fact that effective migration consists of both legal and illegal migrants:

¹⁶ See also Chapters 2.5.3., 5.1.6. and 5.2.4.

$$ME = ME (\text{legal}) + ME (\text{illegal})$$

Thus we have:

$$\text{Migration pressure} = (PM - ME) + ME (\text{illegal})$$

and

$$\text{Migration pressure} = PM - ME (\text{legal})$$

This potential pressure can also be expressed here by migration potential (PM) less the total number of workers who, during the same period, have legally entered a foreign labour market. This definition of migration pressure leads us to the conclusion that, from a certain level of migration potential (PM), migration pressure will be more intense as the possibilities of emigrating legally (legal ME) are fewer.

4.3. Labour market situation in the Maghreb countries and Turkey

As we saw in the chapter on determining factors of migration pressure, these countries are in a situation where high population growth rates lead to a rapid increase in the working-age population. This factor, added to the increase in the activity rate of the working-age population in these countries - especially in the Maghreb -, leads to an even more rapid inflation of the labour supply. This phenomenon, added to insufficient employment creation, leads to a structural imbalance in which:

$$FS^* > FD \text{ and } FS^* > DA + DR$$

The population explosion and the increase in activity rates, from a very low level in the case of the Maghreb, will add to the growth in labour supply (FS^*) for another few decades yet. As for the demand for labour, the structure and evolution of the active population will see to it that, for the next forty years or so, the replacement demand (DR) will remain unchanged. If the additional demand (DA) does not vary, the gap between supply and demand flows will become progressively wider, thus increasing emigration potential (PM).

Given that we are faced with a situation of labour markets that are open to the exterior, and that the propensity to emigrate is positive (> 0), we have a creation of migration flows towards other countries. However, the effective flows are less than the equilibrium flows:

$$ME < ME^*$$

and they are not sufficient to restore equilibrium on the market. In this case, the supply of labour (FS^*) is greater than the domestic and foreign demand:

$$FS^* > DA + DR + ME$$

Then there is an absolute labour surplus (ExA):

$$ExA = FS^* - (DA + DR + ME)$$

which can be expressed as a function of migration potential:

$$ExA = PM - ME$$

The increase in potential migration flows (PM), resulting from a situation in which increased emigration flows (ME) are impossible, will lead to a progressive increase in the absolute labour supply surplus (ExA) and in migration pressure.

4.4. Application of the model to the labour market in the Maghreb countries and Turkey

Before coming to the study of migration pressure in these countries, we must evaluate the flows that they generate, from both labour supply and demand sides. As regards supply, it will be necessary to determine the flows of the working-age population and those of the active population. As for demand, we shall have to determine in terms of flow the increased demand for labour, the replacement demand and the migration flows in these countries. On the basis of these flows we can determine the imbalance between labour supply and demand and measure migration potential and migration pressure. Even though we have already, in the chapter on determinants of migration pressure, presented the basic analysis concerning these countries' demographic dynamic, as well as the situation of the labour market, we must now establish the calculations necessary to our analysis in terms of flow.

Application of the methodology of this chapter to concrete cases requires possession of flow data relating to entries and departures of the population groups under consideration, and for each period. Since not all data in terms of flow are available, we have had to transform data on stock into flow data. Because of these deficiencies and the resulting difficulties of estimation, the application has only an indicative value. We have taken into consideration as far as possible the period from 1950 to 1995 and we shall establish forecasts up to 2010. In this period from 1950 to 2010 we shall work on the basis of five-year intervals. The total and active population will thus be analysed by five-year age brackets.

4.4.1. Evolution of labour market flows

Labour supply flows

On the supply side, in order to analyse migration pressure, we must determine the flows of entries into the working-age population, which is composed of individuals between the ages of 15 and 64, as well as the flows of entries into the active population. Then we shall calculate the total of potential entries into the active population (FS*), which is the result of the addition of entries into the internal active population and the total worker emigration flows during the same period.

Here we examine the determination of entry flows of individuals into the productive phase of their life (working-age population) and into the active population, and also their departure flows. For this, we followed the ageing of each age group and analysed its evolution. We calculated the difference between the numbers in each age group (by five-year bracket) at time t and those of the following group at time $t + 5$. For example, we compared the 15-19 year age group with the 20-24 year age group in 1985. In this longitudinal comparison, carried out in all intervals, we have a (positive or negative) balance for each age group. This balance can be interpreted as the flow. Addition of positive balances represents the flow of entries, while addition of negative balances represents the flow of departures. The difference between the two flows will give the variation in stock of the population group under consideration, in the given interval (Bruni, Franciosi, 1981). This manner of proceeding obviously produces a simplified result in relation to real flows.

The results of the analysis of flows of entries into the working-age population and the internal active population are shown in Tables 19 to 22. For the 1950-1995 period, the working-

age population flows were calculated on the basis of a population estimate according to age (United Nations, 1995). For the same period, the internal active population flows were calculated on the basis of the active population according to age as we assessed it in the chapter on determinants of migration pressure, on the basis of a population estimate (United Nations, 1995) and an estimate of activity rates by age (ILO, 1986). For the period 1995-2010 of the prospective study, the calculations were made on the same bases. The determination of the high and low variant, already dealt with in the chapter on determinants of migration pressure, will again be illustrated in the context of future scenarios concerning migration potential and pressure, which will be established on the basis of certain hypotheses.

Tables 19 to 22 and the corresponding graphs show that from the sixties onwards, in all the countries under consideration there has been a constant increase in net flows for the working-age population and for the active population. From the nineties onwards, according to the variant applied - high or low - and the countries examined, the situation appears more diverse and, in some cases, even indicates a stabilization of these flows.

4.4.2. Demand flows

To evaluate the demand for labour in terms of flow, we must measure the additional demand (DA) and the replacement demand (DR).

The additional demand (**DA**) corresponds to the difference in volumes of total employment expressed in terms of numbers of employed persons between the first and the last year of each five-year interval. For the 1950-1995 period, the additional demand has been calculated or estimated on the basis of available employment statistics. For the period of the prospective study, 1995-2010, this demand is calculated on the basis of two scenarios of growth of additional demand, which we shall present later, in the context of future scenarios of migration potential and migration pressure based on particular hypotheses.

The replacement demand (**DR**) - total number of definitive departures from working life - was impossible to evaluate on the basis of employment statistics. To obtain an estimate, we therefore referred to the total number of persons who had definitively left the active population (Bruni, 1988). We thus calculated the replacement demand for the Maghreb countries and Turkey in Tables 19 to 22 and identified it with the flows of departures from the active population.

By adding the migration flow of workers (**ME**) to the total internal demand (DA + DR), we obtain for each emigration country the total volume of demand for labour expressed in terms of flow (**FD**).

4.4.3. Emigration flows

The model proceeds from the principle that migration is essentially a movement of reorientation towards a foreign market on the part of certain individuals who would wish to obtain their first job on the local market, but who fail to do so owing to insufficient demand. For this reason, the migration flows (ME) that will be used in our analysis are gross emigration flows. As indicated earlier, we shall differentiate between legal and illegal emigration flows.

Because of lack of statistics on gross emigration flows in the countries of departure, these figures will be obtained by adding the immigration flows of the receiving countries. Since we are talking about economic emigration, we shall as far possible use the flow of workers. For countries that do not produce detailed statistics according to the status of individuals (worker or family member), we shall use the total of immigration flows. Given that these countries are for the most part new immigration countries, we can assume that the majority of immigrants will be workers. For countries that do not have statistics on the flows and, in general, as far as the flow of illegal

workers is concerned, the estimates of flows have been established on the basis of available statistics on numbers of workers.

5. Future scenarios of migration potential and migration pressure

For the prospective study of the period from 1996 to 2010, we shall draw up two scenarios which will correspond to high and low values of migration potential and migration pressure. These scenarios are based on the hypotheses of labour supply and demand that we already introduced in Chapter 3. Legal and illegal migration flows are considered as unchanged in relation to the last decade, except in the case of Morocco, where current perspectives suggest a slight reduction in illegal flows compared with the preceding decade.

Scenario of low migration pressure:

- The supply of labour (minimum) is calculated on the basis of projections of *increased activity rates established by the ILO in 1986* and applied to the *low variant of population growth* (United Nations, 1995);
- The demand for labour (maximum) is calculated on the basis of a *10 per cent growth rate of the additional demand per interval*;
- We consider that migration flows, both legal and illegal are *unchanged in relation to present levels*, their value being defined by the average between flows for the periods 1985-1990 and 1990-1995. For Morocco, we consider the levels of illegal flows as corresponding to two thirds of the average between flows for the periods 1985-1990 and 1990-1995.

Scenario of high migration pressure:

- The supply of labour (minimum) is calculated on the basis of projections of *increased activity rates established by the ILO in 1995* and applied to the *low variant of population growth* (United Nations, 1995);
- The demand for labour (maximum) is calculated on the basis of a *5 per cent growth rate of the additional demand per interval*;
- We consider that migration flows, both legal and illegal are *unchanged in relation to present levels*, their value being defined by the average between flows for the periods 1985-1990 and 1990-1995. For Morocco, we consider the levels of illegal flows as corresponding to two thirds of the average between flows for the periods 1985-1990 and 1990-1995.

5.1. Results of the analysis

The calculations relating to our analysis and the findings concerning migration potential and pressure are shown in Tables 23 to 26. The figures contained in those tables provide the bases for graphs, which can be found in Tables 27 to 30.

In Tables 23-26, the flows of internal supply of labour are indicated on line 12, while the flows of total labour supply (FS*) are on line 11. The flows of internal demand for labour appear on line 5. Legal, illegal and total migration flows are shown on lines 6 to 8.

The disequilibrium between the labour supply and demand flows is indicated on line 12, as regards the relative labour surplus in a closed country (migration potential: $FS^* - FD$), and on line 13 as regards the absolute labour surplus in an open market ($PM - ME$). Potential migration pressure corresponds to line 14 ($ExA + ME$ illegal). These figures are also presented in relative terms for the flow of the working-age population and the total labour supply on lines 20 and 21 for migration potential, and on lines 22 and 23 for migration pressure. These data in relative terms can be used more easily to establish comparisons.

Total propensity to emigrate in the case of individuals (ME/PM) is indicated on line 26, but it is also differentiated according to whether one is considering propensity to emigrate legally (line 24) or illegally (line 25).

The tables also show, on lines 15 to 19, different rates of absorption of labour supply. These rates indicate what proportions are absorbed by national demand (FD/FS^*), foreign demand (ME/FS^*) and finally by total domestic and foreign demand ($FD + ME / FS^*$).

Other rates are calculated at the end of the tables. They indicate, in relation to entries into the working-age population, the percentage of persons making up the total supply of labour (total participation rate), that of persons who find employment within the country (total employment rate), as well as the percentage of persons who emigrate (total emigration rate).

5.1.1. Earlier trends

While in the case of Algeria and Morocco, the trends towards disequilibrium between labour supply and demand are fairly regular, the same is not true of Tunisia. This irregular trend in the case of Tunisia, which can be observed in the 1965-1980 period (Table 33) is caused by the variations in the definitions of active and employed active persons used in national labour statistics.

In the case of Algeria (Table 31), the trends can be studied for the period 1980-1995 only, because of lack of sufficient statistics for the preceding period. For the period under consideration, it was not possible to estimate the irregular flows. However, we consider that, as far as Algeria is concerned, these flows are fairly limited and cannot therefore invalidate our considerations.

As for Turkey (Table 34), the variations in the findings sometimes lead us to question the statistical data used. Furthermore, overestimation of employed active persons in the national statistics lead to underestimation of the disequilibrium between labour supply and demand and has the effect of distorting the results of our analysis.

5.1.2. Migration potential

One of the findings of our analysis concerns the evolution of the relative surplus supply of labour (migration potential PM), represented in graphs 31 to 34 by the absolute labour surplus, to which are added the migration flows. This migration potential is very significant. It increased in the case of Algeria for the period 1980-1995 and has been increasing sharply in the case of Morocco since the eighties. As for Tunisia, this migration potential seems fairly significant but stable for the period 1975-1990, and on the decline for the period 1990-1995. Trends in Turkey show very low levels up to 1980, a higher level for 1980-1985 and a decline for the 1985-1995 period. In the Turkish context, the comments made earlier must be taken into account.

If we examine migration potential in relative terms, it would appear that, for the Maghreb, Tunisia obtained the best results since the PM represents 19 per cent of the working-age population in 1990-1995, whereas in the same period it was 28 per cent in Algeria and 34 per cent in Morocco. For these two latter countries, migration potential in relative terms has increased steadily since 1980. Turkey has also produced good results, since migration potential represented 16 per cent of the working-age population in the same period 1990-1995.

To corroborate the better results of Tunisia and Turkey, we note that the rate of domestic absorption of the labour supply in these two countries (total entries into national employment / total labour supply), 71 per cent and 78 per cent respectively, in the 1990-1995 period, are higher than the rates in Algeria and Morocco, 39 per cent and 46 per cent respectively. In the case of Tunisia and Turkey, there has been an improvement in this rate - in the later period only for Tunisia and since 1985 for Turkey -, while in the case of Algeria and Morocco this rate has deteriorated since 1980 (start of our analysis) for the former country and since the sixties for the latter.

However, even if we can state in this comparison that Tunisia and Turkey produce better results, it is undeniable that, generally speaking, the percentages of migration potential in relative terms for these countries are high, indicating that labour market disequilibrium is still one of the fundamental problems of those economies.

5.1.3. Absolute labour supply surplus

We can observe that there has been a steady increase in the absolute labour supply surplus, in the case of Morocco since the 1975-1980, and in the case of Algeria since the 1980-1985 period. For Tunisia and Turkey, after an irregular evolution, it would appear that the absolute labour supply surplus has decreased, since 1990 for the former country and since 1985 for the latter. This would confirm the higher level of performance of these countries.

Our analysis makes it possible, among other things, to bring out the very slight gap between the relative and the absolute labour supply surplus, which is produced by the fact that emigration, legal or illegal, has a very limited effect on the total supply of labour. This phenomenon leads us to assert that the demand for foreign labour has contributed little to solving these countries' employment problems. Moreover, as might be expected, this contribution by the foreign market has even decreased since the closure of the European frontiers, which was noticeable for Morocco in the 1975-1995 period (Table 32), and for Tunisia and Turkey in the 1975-1995 period (Tables 33 and 34). In the case of Morocco for the period 1985-1995, a more significant contribution was provided by the flows of irregular workers, which cannot be said of Tunisia where the flows of irregular workers remain constant and fairly limited in proportion to the supply of labour, even though they are still greater than the flows of regular workers.

5.1.4. Total absorption of the labour supply by the foreign market

Trends in the contribution of the foreign market are confirmed by the analysis of total absorption of the labour supply by foreign countries (line 18), which shows that while emigration in the past represented a "buffer" solution, after the closure of the European frontiers it provided only a marginal contribution to solving the problem of manpower absorption. The marginality of this phenomenon concerns not only legal but also illegal migrations.

The maximum levels of total absorption of the labour supply by the foreign market were considerable in the 1965-1970 period for Morocco, where the rate was 22 per cent, and in the 1970-1975 period for Tunisia and Turkey with rates of 22 per cent and 14 per cent respectively. Subsequently, after the closure of the frontiers, these values dropped to 7 per cent for Morocco and Tunisia and 3 per cent for Turkey in the 1975-1980 period. As we can see, Turkey is the country

in respect of which the foreign market contributed least to the absorption of labour, for all periods. In the case of Algeria, we can observe that, in the 1980-1995 period, the rate of labour absorption by the foreign market is very low - 2 or 3 per cent only, which can be explained by the relative inconsistency of Algerian worker emigration flows.

As for Morocco, the situation confirms what we said earlier on the subject of the absolute labour supply surplus: this is the only country to show a recent increase in the total absorption of national labour by the foreign market, with a rate of 13 per cent for the 1985-1995 period. This phenomenon is due to the increase in the flow of irregular workers, and we see that it is solely the absorption rate of illegal migrants by the foreign market that has increased.

5.1.5. Propensity to emigrate¹⁷

According to the definition given earlier, total propensity to emigrate corresponds, for a given period, to the relation between effective migration flows (legal and illegal) and migration potential. This relation indicates the extent to which a country depends on migrations to deploy its relative labour supply surplus.

For all the countries, we can observe a decline in propensity to emigrate, which reflects a reduction in the demand for immigrant labour in the receiving countries. For Tunisia, the decline in propensity to emigrate from the 1965-70 period onwards was followed by a rise in the 1980-85 period, which was due to the increase in departures to other countries (mainly Libya), and another rise in the 1990-1995 period, due to a reduction in migration potential rather than to an increase in effective departures. It emerges from this analysis that there is nothing alarming about the situation as, contrary to what was feared by European countries which consider that emigration (legal and illegal) depends first and foremost on push factors in the country of departure, the decline in propensity to emigrate shows that the variation in the inclination of workers to emigrate reflects above all the needs for immigrant workers in foreign labour markets.

5.1.6. Migration pressure¹⁸

Here we must speak of *potential* migration pressure, given that this assessment of the phenomenon is only indirect. While workers in an irregular situation in a foreign country (in terms of flow) are by definition candidates for settlement outside their country of origin, this is not the case with the second component, migration potential. The latter can only provide an estimate of those who could be candidates for expatriation, given the impossibility of their being integrated into the national labour market, though that does not prove that they are, or may be, effective candidates for departure.

Migration pressure in relative terms, as a proportion of the working-age population is the subject of Table 35. In the case of Tunisia and Turkey, after an irregular development, we observe a declining trend. In the case of Algeria and Morocco, we observe a sustained and regular growth.

This phenomenon must, however, be compared with the propensity to emigrate within the population. In the case of Morocco, this migration pressure is accompanied by a fairly strong propensity to emigrate ($ME / PM = 0.24$ for 1990-1995), even though it is declining, whereas, in the case of Algeria, this migration pressure is associated with a very low propensity to emigrate ($ME / PM = 0.04$ for 1990-1995). It is only in Morocco that we may thus expect this potential migration pressure to correspond to an actual migration pressure. This is borne out by the analysis

¹⁷ See also Chapters 2.5.1. and 4.2.7.

¹⁸ See also Chapter 2.5.3.

of migration pressure as a function of its two components. While, in the case of Algeria, the illegal migration flows must be considered as limited in terms of numbers of migrants, as far as Morocco is concerned, irregular flows, in the 1990-1995 period, account for 20 per cent of the build-up of this potential migration pressure. In general, therefore, it is in Morocco that we find the most critical situation from the point of view of migration pressure, even though, in the other cases, we cannot minimize the labour market imbalances and state that they are derisory and irrelevant to the countries concerned.

5.2. Forecasts

In respect of the 1995-2010 period, we must analyse the results from the angle of two scenarios, high and low, of migration potential and pressure (Tables 23 to 26) that we presented earlier. Some of these findings appear in the corresponding graphs (Tables 36-39).

5.2.1. Migration potential¹⁹

For the relative labour supply surplus (absolute surplus increased by migration flows), the *low scenario* produces very different situations from one country to another. In Algeria, this surplus would remain at a very high and more or less stable level in relation to the total labour supply, compared with the 1990-1995 period. This would also be the case for Morocco, to a lesser extent however, with a slight but steady improvement in comparison with the 1990-1995 period.

In the case of the low scenario in Tunisia, after an increase in migration potential in the first two periods compared with 1990-1995, we might observe an improvement for the 2005-2010 period. This improvement would be due to a reduction in entries into the working-age population - as a result of the impact of a decline in population growth rates among the 15-63-year-old age groups -, which occurred in Tunisia earlier than in other Maghreb countries. This ageing of the population would also lead to an increase in the domestic demand for labour as a result of an increase in replacement demand. These two phenomena combined, which are to be attributed to the completion of the demographic transition, would lead to a reduction of the imbalance between labour supply and demand and, ultimately, of migration potential.

In the case of the low scenario in Turkey, we can apply the same considerations on the completion of the demographic transition for the final period 2005-2010. Furthermore, over the period under consideration, the migration potential for this country in relation to the total supply of labour would be at a low level compared with that of the Maghreb countries.

In the *high scenario* of migration pressure, the situation would be so serious for the three countries of the Maghreb that migration potential would represent between 50 and 70 per cent of the total supply of labour. In Turkey, the situation would be a little less serious though still a cause for concern.

5.2.2. Absorption of total labour by foreign markets

Our hypothesis of a stabilization of legal and illegal emigration flows - on the basis of those recorded for the decade from 1985 to 1995 (or of a slight decline in the case of Morocco) -, accompanied by a more or less steady rise in the total supply of labour, leads, in the two scenarios and for all countries, to a decrease in the rate of labour absorption by foreign markets. These rates, which, as we have said, reached peaks of 22 per cent in periods of high emigration,

¹⁹ See also Chapters 2.5.1., 4.2.5. and 5.1.2.

would, in the two scenarios, be 1 or 2 per cent for Algeria and Turkey, 6 or 7 per cent for Tunisia and 6 to 8 per cent for Morocco.

These very low rates would indicate that the demand on foreign markets would be likely to provide only a marginal contribution to the problem of the absorption of national labour. While emigration is not and cannot be considered as an instrument to solve the problems of labour market imbalances, it is none the less true that these imbalances will persist and that migration potential and migration pressure will remain high.

5.2.3. Propensity to emigrate²⁰

In the low scenario, propensity to emigrate is higher than in the high scenario because with equal levels of migration flows (ME), the migration potential (denominator of the ratio ME / PM) is lower.

For all the countries, we see that the low scenario indicates an increasing propensity to emigrate during the final period 2005-2010. This increase, especially noticeable in the case of Tunisia and Turkey, corresponds to the migration potential registered in this interval.

For all countries studied, we can observe in the high scenario a decline or a stabilization of the propensity to emigrate in relation to the demand for immigrant labour in the receiving countries, which we considered to be stable compared with the 1985-1995 period. This propensity to emigrate in the high scenario would correspond to levels that are somewhat lower than those of the last period 1990-1995.

5.2.4. Migration pressure²¹

As we can see in Tables 28 to 30, for the three countries of the Maghreb, potential migration pressure in relation to the working age population in both scenarios will show higher levels than at present. We note, however, an exception in the case of the low scenario for Morocco, which indicates a certain stabilization.

For Turkey, an increase in the first two intervals should be followed by a decline in the last period.

On the basis of these clear indications, we must conclude that, in view of the absence of measures designed to promote the growth of employment in the Maghreb countries, the fact will have to be faced that migration potential will increase rapidly, especially in the high scenario. If this situation is not reflected in a wave of emigration, it could give rise to strong migration pressure and cause a certain economic and social instability in the southern Mediterranean countries.

Since migration pressure is not an effect of migration potential alone but also results from foreign demand for labour, migrant admission policies in the European countries will also be determining factors, according to whether they will allow regular immigration flows or reduce drastically the number of entry visas and work permits issued, leaving illegal immigration as the only possibility for the workers.

5.2.5. The case of men

²⁰ See also Chapters 2.5.1., 4.2.7. and 5.1.5.

²¹ See also Chapters 2.5.3., 4.2.10. and 5.1.6.

In the Maghreb countries and Turkey, the flows of economic emigration indicate that the propensity to emigrate is higher among the male population than the female. We should therefore break down the active population and the working-age population according to sex.

Such an analysis would be useful, given that we took into account, in the chapter on determinants of migrant pressure, the possible existence of "female occupations" and hence of a differentiated demand for men and for women, as well as a relative increase in the demand for female workers.

An increase in the demand for female workers, coupled with a lower-than-average propensity to emigrate, would give rise to a migration potential lower than that indicated in our overall analysis, while in the case of men, an increase in terms of the flow of surplus labour supply, associated with a higher-than-average propensity to emigrate, would create in the years to come a higher migration potential than that presented in our analysis.

6. Conclusions

For the European countries, the problem of Mediterranean migration will probably be one of the most important international issues of the coming decades, which, if the situation were to deteriorate, could turn into a threat to the economic and political stability of the region. While there is a general awareness of the need for a global approach to the question, by associating development with migrations, very little has actually been done to bring this about, if one considers the scale of the problem to be solved, and the situation in the countries of departure has not been sufficiently taken into account. While much is said about providing substitute solutions for migration, what is provided amounts to no more than development aid. The effects on the employment market of trade liberalization in the Maghreb and of the establishment of free-trade zones between the EU, Morocco and Tunisia have not been taken into account at political level. Moreover, too little thought has been given to the question of how to promote direct foreign investments and the relocation of European enterprises in this region, in order to ensure its economic development.

In this political context, the root causes of migration pressure, be they demographic or economic, have persisted and even worsened in certain cases, and they are not likely to diminish in the years to come. The study of the future evolution of the active population clearly indicates that the labour market situation is the central problem of these countries' economies, and that the creation of employment, decently remunerated for nationals, poses the greatest challenge that these countries will have to meet in the coming decades.

Indeed, as shown by our analysis, which is primarily based on demographic pressure and its effects on the number of job seekers, the Maghreb countries and Turkey present a situation where high demographic growth rates lead to a rapid increase in the working-age population. This factor, together with increased activity rates, especially in the Maghreb, leads to an even more rapid rise in the labour supply flow. The demographic upsurge and increased activity rates, starting from a very low level in the Maghreb, will sustain the growth of the labour supply for several decades yet. To cope with the additional supply alone, the Maghreb countries as a whole would have to create about 10 million new jobs during the 1995-2010 period. This target appears difficult to attain, bearing in mind that this figure corresponds more or less to the total employed population in 1982.

However, even with the completion of the demographic transition, there is no certainty that the reduction of the flows of persons of working age will be sufficient to solve these countries'

economic problems. We must also consider the factors operating on the labour demand side, which lead to the creation of an insufficient number of new jobs.

The present situation and trends in different sectors of the economy suggest that their capacity to create jobs will not be sufficient to absorb the new job seekers. Moreover, it is important not to underestimate the impact of economic policy measures on the employment market. At present, and especially in the context of structural adjustment programmes, employment is not considered as an end in itself and is only seen as a consequence of the activities and expansion of enterprises. Indeed, the authorities in charge of economic policy consider that promoting employment at the expense of competitive technology curbs the expansion of enterprises and their internal and external competitiveness, and therefore impedes the promotion of employment in the long term. Furthermore, given that the expansion of the private sector is based on exports and that this sector is exposed to international competition, labour policy will inevitably have to opt for measures of wage restriction.

One of the results of our analysis concerns the importance and evolution of migration potential. Although the figures reflect a fairly contrasted situation according to the country under consideration, even with some improvements during the period considered in the case of Tunisia and Turkey, it cannot be denied that, generally speaking, the percentages of migration potential in relative terms presented by these countries are high, which is an additional proof that imbalances in the employment market are still one of the fundamental problems of their economies.

If we now consider the analysis of the absorption of the labour supply by foreign markets, we see that, while emigration could represent a "buffer" solution in the past, it is clear that, since the closure of the European frontiers, migrations, whether legal or illegal, have provided only a marginal contribution to solving the problem of labour absorption.

For all the countries, we see a decline in propensity to emigrate, which reflects the decreased demand for immigrant labour in the receiving countries. The analysis shows that there is nothing to be alarmed about as, contrary to what was feared by the European countries which consider that emigration (legal and illegal) depends primarily on push factors in the countries of departure, the decline in propensity to emigrate shows that the variation in the inclination of workers to emigrate reflects above all the needs of foreign labour markets for immigrant workers.

As regards migration pressure, we must consider it as potential, given that this estimation of the phenomenon is only indirect. This latter must be viewed in comparison with the population's propensity to emigrate, but it is in Morocco that we find the most critical situation from the point of view of migration pressure. This country is the only one that shows a recent increase in the rate of absorption of national labour by foreign markets, a phenomenon due to the increase in the flows of irregular workers.

In respect of the prospective study of the 1995-2010 period, for the three countries of the Maghreb, potential migration pressure in relation to the working-age population will present, in the two scenarios, values higher than at present, with the exception of the low scenario for Morocco, which indicates a certain stabilization at a high level. For Turkey, an increase in the first two intervals should be followed by a decrease in the final period.

On the basis of this analysis, we must conclude that, given the absence of appropriate measures designed to support employment growth, the fact must be faced that migration potential will increase rapidly, especially in the high scenario. If this situation is not translated into a movement of emigration, it could give rise to a certain economic and social instability in the countries to the south of the Mediterranean. Eventually, even if the European countries do not have to fear migration pressure, given that the propensity to emigrate is low, they must none the less act to support the capacity of the Maghreb countries and Turkey to absorb their labour supply.

If the aim is to reduce migration potential, action must be taken on the labour supply side as well as on the demand side. While stabilization of population growth must be one of the priority

objectives, importance should be placed on economic policies designed to promote labour-intensive production so as to create jobs.

Furthermore, since migration pressure is not the effect of migration potential alone but also the effect of the foreign demand for labour, policies concerning the admission of migrants into European countries will be crucial. Here we have a conflict of interests between the group of immigration countries and that of emigration countries, and it is to be feared that this conflict will worsen during the coming years. The immigration countries will become more restrictive and deal with questions of immigration from a unilateral viewpoint. Their determination to limit the flows of immigrant entries will lead them to reduce to a minimum the number of entry visas and work permits issued, thus leaving illegal immigration as the only alternative. This trend will not be counterbalanced by the opening-up of migration flows towards other countries. The emigration countries, for their part, faced with the impossibility of creating the necessary new jobs, might choose not to prevent irregular emigration.

According to an optimistic hypothesis of economic development, the present opening-up of the economy of the Maghreb countries and Turkey should effectively succeed in attracting foreign investments. This operation would lead to an increase in the additional demand and, consequently, to a decrease in these countries' migration potential.

It would also be necessary to study the composition of this additional demand and identify the types of workers demanded in terms of wage levels, training required and sex. In fact, the economic emigration flows indicate that the propensity to emigrate is higher in the male than in the female population. We should therefore, in our analysis, make a breakdown of the active and the working-age population by sex. The increase in the demand for female labour, as this has been envisaged in our study, would determine a lower migration potential than that presented in our overall analysis, while for men the increase in terms of flow of surplus labour supply would determine for the coming years a higher migration potential than that presented in our analysis, accompanied by the higher than average propensity to emigrate.

Nevertheless, certain doubts may exist as to the effective relocation of European production and the orientation of direct investments towards the Maghreb countries. Moreover, even if economic development would probably have generalized repercussions on the population as a whole, in the short term the effect could be different.

In a pessimistic perspective, the modernization of the economy and the opening-up to the exterior, if not accompanied by a sufficient volume of direct foreign investment, might encourage an increase in imports, a decline in growth and a intensification of migration pressure. The pressure might be particularly felt by young persons with a higher education level. Those among them who did not succeed in becoming economically integrated in their country of origin might easily opt for emigration. In the present situation, there is nothing to suggest that there will be an increase in foreign investment flows.

Annex. Documentation concerning migration movements from the Maghreb countries to Europe

a.1. Introduction

In this annex, we have documented the migration flows as well as the situation of the North African communities in Europe. The two aspects are, of course, linked, and the evolution of the migration phenomenon from its origins to the present day has led to modifications in the characteristics of the foreign population residing in Europe. The migration phenomenon as a whole will be analysed in relation to the position of the countries of departure but also that of the European countries concerned. We shall not analyse the situation in each receiving country, but we shall give significant examples according to the subjects treated. Among these countries, a special place is occupied by the countries of Southern Europe, which had been the chief source of migrant workers during the sixties and seventies and have now in their turn begun to attract foreign workers.

At present, in almost all European countries the migration balance with developing countries is positive. Nevertheless, experiences differ according to the earlier or current scale of the phenomenon, the length of time the immigrants in question have been in the country, the structure of the flows and the types of policy pursued with regard to immigrant populations.

The evolution of the migration phenomenon shows that the policy of the host countries can affect the flow of migrant entries, but only in part. In the first place, in the traditional immigration countries, the policy of closing the frontiers has resulted not in a halt to migrations but in a modification of the composition of flows, with a reduction in the number of active persons and an increase in the population of residents who are dependants of foreign workers. In the second place, in recent immigration countries there has been a rise in the flow of workers in an irregular situation, who still account for a large proportion of immigrants. It should, however, be added that the presence of immigrants in irregular situations, even if it is quite considerable, is often exaggerated by the media.

Immigration flows in Europe have always been considered as being motivated by a search for temporary work and not destined to lead to the establishment of settled immigrant populations. This point of view was shared by the host countries and the Maghreb countries of departure. It was also the point of view of the migrant workers, who planned to accumulate savings which would be reinvested in the country of origin on their return. Since the end of the seventies, with the reconstitution of families on French, German, Belgian and Dutch territories, this project has been in part modified by the migrants.

a.2. Transformation of existing situations and effective immigration

The situation prevailing in countries with an immigration past, which is rapidly becoming the situation of the new immigration countries, is that the majority of regular and irregular flows of workers cannot be reduced, as they correspond to structural shortages of labour. In fact, the classic supply of immigrant labour, as well as that of a workforce already regularly established, is being rejected by the European labour market, which prefers a more adapted, better qualified or more mobile immigration. We see, on the one hand, that new flows of legal workers consist almost exclusively of migrants with sought-after skills and, on the other hand, that irregular and seasonal workers apparently better meet the requirement of mobility which corresponds to the development of small enterprises in the informal or underground economy in the case of irregular workers, and in the agricultural or construction sector in the case of seasonal workers.

For Italy as for Spain, the transformation into immigration countries is due to the situation of these countries, but also that of other European countries. The sudden rapid growth of North African immigration to Italy since 1986 is the result of the interaction of a number of factors (Labib, 1996):

- the interruption of immigration in the countries that traditionally received North Africans; it is therefore more a question of adjustment to the restrictive measures adopted by these countries than a response to the imaginary or real opportunities offered by Italy;
- Italy was not originally a settlement destination for North Africans, but a "transitory" stage on the way to other immigration countries that had "locked them out"; in short, they came to Italy because, like Spain, it was still a country of easy access, allowing them to do business or to move on to countries that had closed their frontiers;
- at the end of the eighties, the countries that traditionally received North African emigrants introduced an entry visa requirement for nationals of Maghreb countries, thus complementing the system of eliminating immigration for employment purposes which had been adopted from the mid-seventies; obtaining a visa is not a mere administrative formality but involves long, complicated, costly and uncertain procedures;
- thousands of North Africans who considered themselves as "passing through" Italy found themselves "forced" to remain there as a result of the improved "lock-out mechanisms" introduced in the traditional immigration countries; now they are adopting a strategy of settlement in Italy.

Initially, the absence of legal regulations defining conditions of entry and residence in the Southern European countries, together with the manpower requirements of certain sectors, facilitated this movement, which could subsequently be kept going by means of migration networks. However, under pressure from their European partners, Italy and Spain have adopted a legal system in respect of immigration, which is comparable to that of the rest of Europe, as regards restrictions on entry, residence and employment applicable to non-Community members. With this new situation, the flows would appear to be stabilizing.

a.3. The North African population residing in Europe

The rate of increase in the total number of foreigners - of all origins combined - in relation to the population as a whole was particularly high in certain European countries during the 1981-1991 period. The foreign population practically tripled in Italy and Finland and doubled in Spain, Austria, Norway and Denmark. In Italy and Spain this increase was largely due to North African immigration.

For Europe as a whole, the grading by region of origin of the numbers of foreigners (from outside the European Union) shows the Turkish population in the lead, ahead of the North African community (Tables a.1 and a.2). As regards the distribution of North Africans over the various host countries, while the community of Algerian nationals is concentrated almost exclusively in France, the Moroccan and Tunisian communities are present in several host countries.

a.3.1. The effects of nationality rights on numbers

An analysis of trends in the total numbers of immigrants should take into account the possibility of acquiring the nationality of the host country (Table a.3). Countries like Germany and Switzerland have laws containing stricter conditions in respect of naturalization, while Sweden, Norway, the Netherlands, Denmark, Belgium and France currently grant nationality to immigrants more rapidly. In particular, these countries accept dual nationality. As a result of having acquired the nationality of the host country, members of foreign nationality communities disappear from national statistics. The above-mentioned group of countries have thus represented another method of "exit" for foreigners, a legal exit rather than a geographical exit like departure, and this situation reflects the conviction of certain political authorities in these countries that the acquisition of nationality speeds up integration. In countries where the nationality laws have recently been changed to facilitate naturalization, the effects - in the sense of the number of actual naturalizations - were very rapidly felt after the new regulations came into effect.

In 1993, Sweden and the Netherlands were the countries of the European Union that granted naturalization to the highest proportion of their foreign residents: 7 per cent and 5 per cent respectively (EUROSTAT, 1995). If we analyse the naturalization rates of members of the Turkish community in the different European countries, in relation to the numbers residing in the country, we see that the rate is very high in Sweden; then come the Netherlands and Norway, with Belgium and Germany in the last place. If we consider more particularly the population of Turkish origin residing in Germany and the Netherlands, we see that in 1994 the number of naturalized Turks in the Netherlands was greater (almost double) than that of naturalized Turks in Germany, though the Turkish population in the Netherlands is one ninth of that in Germany.

The fact that Turkish immigration in terms of total numbers is the highest in Europe, and that Germany is the European country with the greatest number of resident immigrants who are citizens of countries that are not members of the European Union (4,395 million in 1992) - ahead of France (2,284 million in 1992) - is due to the volume of earlier flows but also to the differences in the nationality laws in force in the European countries. The right to French nationality, based on a combination of right of soil (place of birth) and right of blood (ancestry) has made it easier for foreigners to acquire French nationality. In France this right is governed by the Act of June 1993. In Germany, the right to nationality is a right of ancestry (blood), even though certain principles of the right of soil (place of birth) were timidly introduced by the Act of 1990. The attribution of nationality at birth is based exclusively on ancestry; naturalization is considered as an exceptional procedure and is granted on a case-by-case basis, subject to prior demonstration that the candidate is well integrated into German society. One of the consequences of the German conception of nationality is the non-recognition of dual nationality. The new German law concerning foreigners, dated July 1993, tends, however, to grant German nationality more easily, by simplifying the conditions required of certain categories of foreigners. This right to acquire German nationality can therefore be considered as an advance in relation to the discretionary law in force since 1990.

If we compare the effect of the two systems of acquiring nationality, we see that France, in the period from 1980 to 1992, granted an annual average of 54,700 naturalizations - all nationalities of origin combined -, to which must be added an annual average of 21,800 naturalizations of young persons born in France of foreign parents, and who become French when they reached their majority. More precisely, the number of persons who acquired French nationality was 88,500 in 1990, 95,700 in 1991 and 95,300 in 1993 (Lebon, 1993, EUROSTAT, 1994). In Germany, for the same period 1980 to 1992, an annual average of no more than 16,000 persons acquired the nationality of that country. If we consider the Tunisian community in France, we see that, while the Tunisian authorities reckoned at 340,000 the total number of their nationals in France in 1990 (Office des Tunisiens à l'étranger, Tunisia, 1994), at the time of the 1990 population census in France, 206,336 persons declared themselves to be of Tunisian nationality. The difference between these two figures is to be attributed essentially to persons who became French citizens while keeping their Tunisian nationality.

a.3.2. Numbers of North Africans

At the present time, the strong North African representation in Europe is brought out by an analysis of statistics for the entire region as well as at national level in a number of European countries (Tables a.4 to a.7). Apart from in France, where the situation is special, this phenomenon is due above all to the Moroccan presence, which increased almost threefold during the period from 1975-1990.

Among the North African communities in Europe, the Moroccans are indeed the most numerous and, while they represented 30 per cent of the North African population in the seventies, they accounted for over 50 per cent at the beginning of the nineties. One

characteristic of the Moroccan population is that it is widely distributed over all European countries. This characteristic, already manifest in the seventies, has been further accentuated in recent years. While France was host to 68 per cent of the Moroccan population in Europe in 1975, by 1993 this figure had gone down to 51 per cent. During the same period, the percentage of Tunisians present in Europe and established in France went from 86 per cent to 73 per cent. In a number of European countries, the classification of foreigners (from countries not members of the European Union) shows a strong Moroccan representation. Moroccans are in first place in Belgium, Italy and Spain, and in second place in France (after the Algerians) and in the Netherlands (after the Turks).

At first glance, while the numbers of Algerians and Tunisians, especially among the male population, stabilized in the nineties in France, the Netherlands, Belgium and Germany, the number of Moroccans has increased as a result of the regularization of immigrants in irregular situations - in Italy and Spain - and of family reunification.

The concentration in France of the Algerian population resident in Europe is due to the fact that Algerian emigration has always been directed almost exclusively towards this country. This trend was confirmed even after the abolition of the administrative advantages previously granted to Algerian immigrants only. However, for reasons associated with the acquisition of nationality and the slowing-down of flows, according to the 1982 and 1990 censuses, the number of Algerians residing in France has diminished. The Algerians do not appear to be attracted by Italy or Spain and, though their numbers in these countries have increased, they are still a minority among North African community.

Although the Tunisian community is the longest established among the immigrant groups in Italy - it has been represented there since the sixties by migrations of fishermen and sailors to Sicily -, and also the most numerous, it has been overtaken by the Moroccan community since the end of the eighties. From the point of view of Tunisia, Italy comes second after France as a destination for its emigrants, 44 per cent of whom live in the south of the country and above all in Sicily (Office des Tunisiens à l'étranger, 1994).

The phenomenon of the increased number of immigrants has two different explanations according to how long ago the migrations took place. In the traditional immigration countries, the increase in the number of immigrants has been due, since 1973-74, to the family reunification movement as well as to the natural population growth resulting from this. We can even observe that, in France, the principal foreign population growth factor is natural increase, as immigrant North African women have a higher fertility rate than the female population of the host country. Thus the percentage of immigrants in the total population increases through natural reproduction alone. However, from the second generation on, the fertility rate falls into line with the national average of the country of residence, which is a sign of integration. According to the Tunisian authorities, the numbers of Tunisians in France should go down with time, under the combined effects of the closure of frontiers, returns, deaths and naturalizations.

In the Netherlands, because of naturalizations and reduced immigration flows, the Moroccan and Turkish populations diminished in 1993-94 (Muus, 1996).

In Italy and Spain, as a result of a flow of worker entries, the foreign population rose fairly rapidly to high levels, especially after the two regularizations of 1985-86 and 1991 for Spain, and 1986-87 and 1990-91 for Italy. In Spain, the number of Moroccan residents, which was reckoned at 5,200 in 1985 is now 61,000, representing 75 per cent of African immigrants. In Italy, the number of Tunisians, which was estimated at 4,400 in 1985, had risen to 50,000 in 1993, while the Moroccans - of whom there were about 2,000 in 1985 - had increased to over 97,000 in 1994. Italy, however, registered a decline in 1994 for Tunisians, and in 1995 for Moroccans, which suggests a trend towards stabilization of numbers. This phenomenon must be confirmed, however, on the basis of the results of the 1996 regularizations.

a.3.3. Economically active North Africans and their families

It is difficult to get an overall picture of the active North African community in Europe since the host countries use different statistical elements, which makes direct comparison of data impossible (Tables a.8 to a.11). In Belgium and the Netherlands, wage-earning foreigners only are counted, whereas in Germany the data concern the number of work permits issued. In Italy, there are no statistics available on economically active foreigners. It is only in France that it is possible to follow trends in the composition of the North African population by analysing census data. We can see that, while 55 per cent of this population was active in 1968, this proportion fell to 35 per cent after the eighties as a result of the development of the family reunification process in France. In Italy and Spain, given the relative newness of the migration phenomenon and the fact that this for the most part concerns immigration of workers, we can assume that the majority of this population is active. Statistics on the Netherlands show a decrease in absolute terms of employed Moroccans and Turks since 1992, but this would be due to the phenomenon of naturalizations.

Immigration in Italy, and to a certain extent in Spain, concerns migrant workers and is still an individual immigration, as is borne out by its distribution by age and sex. The family reunification phenomenon should, however, develop in the southern European countries, and eventually make up the bulk of new entries, as in the traditional immigration countries. In this way, North African migrants will show that even these countries are no longer transit regions but countries of definitive settlement. The precarious situation in which the immigrants find themselves in these countries, as a result of the fact that this immigration was very rapid and occurred during a period of economic crisis, makes it impossible for them to be integrated socially and economically for the moment.

In Italy, the Moroccans are the immigrant group that has availed itself most of the possibility of family reunification offered by the law. In 1994, there were 3,765 requests granted to Moroccans, representing 30 per cent of the total of requests granted to nationals of all geographical regions combined (Centro di Studi Investimenti Sociali (Censis), 1995). The phenomenon is also confirmed,

in lesser proportions, for the case of the Tunisian community. Even if the figures concerning North African immigrants in Italy are very low compared with the French figures, they suggest the beginning of a new phenomenon.

As regards family reunification in Italy, it concerns communities belonging to the first wave of immigrants that arrived in this country and acquired a degree of stability that made it possible for their relatives to join them. In Italy, applications for family reunification are made for the most part in the northern part of the country. This fact indicates that foreigners are more likely to become integrated in this part of the territory, because of greater business and employment opportunities, and also because of more advanced social and health care services. It appears to be more difficult to find employment and job security as well as favourable economic conditions in the centre and southern part of the Italian territory (Censis, 1995).

As regards the low rate of family reunification among Tunisians, compared with Moroccan families, according to the Tunisian authorities, the living standards of the poorer population classes, which are higher than in Morocco, are high enough for families to remain in the country and not seek to join the emigrant head of the family at the earliest possible opportunity.

a.3.4. Distribution by sex

Since the years 1973-74, admission into European territory of members of families of workers who had decided to remain has led to an increase in the proportion of women in the resident immigrant population. Women represented 40 per cent of the North African population in Europe at the beginning of the nineties, and it is in the Tunisian community that the rate of female presence has been lowest: 35.7 per cent. This average for Europe nevertheless hides disparities between host countries. In the older immigration countries where family reunification is an established phenomenon which has thus led to a natural population growth, the female representation is over 42 per cent. In France, for example, the proportion of women in the North African community rose from 30.6 per cent in 1975 to 42.3 per cent in 1990, and in the Netherlands in 1995 this proportion was 45 per cent among the Moroccan and 47 per cent among the Turkish population.

In southern Europe, the North African immigrant populations are still marked by a predominance of the male component. In Spain, for example, women account for 28.6 per cent of the North African population, and this percentage is even lower in Italy. In this latter country, however, the male component of the Moroccan population has diminished as a result of the Moroccans' availing themselves more of the possibility of family reunification. We see that in this country women represent 15 per cent of Moroccans and 13 per cent of Tunisians.

On the other hand, it should be noted that women have arrived in Italy alone, and not only in the context of family reunification. In this respect, Italy is different as regards the presence of this female component, which did not exist - at least at the beginning - in North African emigration towards the other European countries (Labib, 1996).

a.3.5. Distribution by age group

The flow trends and the length of time in which immigration occurred have had an impact on the population age structure in the European host countries.

In the traditional immigration countries, the end of the myth of return associated with the phenomenon of family reunification has meant that different age groups are represented. The increased numbers of children and young persons and the existence of integration problems have made the North African communities more "visible" and contributed to introducing the question of immigrant populations into the internal debate. In these countries, the increase in the immigrant population over the age of 65 is an unexpected phenomenon, to which the European countries are only now beginning to give thought in terms of policy. Indeed, retired persons - those who have been joined by their family when they were on their own - are not returning, as expected, to their country of origin and are contributing to the ageing of the European population.

In the recent immigration countries of southern Europe, very young persons are still few and we cannot really talk of a second generation of immigrants. In Spain, the population between the ages of 20 and 44 represent 48 per cent of the total Moroccan population (Ministerio de Asuntos Sociales, Direccion General de Migraciones, 1994). For immigrants in Italy as a whole, persons between the ages of 19 and 40 account for 72 per cent of the total. In the immigrant communities which, like the Tunisians, have least availed themselves of the family reunification procedures, this proportion may be as much as 90 per cent.

With the family reunification that has already begun, the age structure of the resident immigrant population would change rapidly. Bearing in mind the absence of policies designed to integrate immigrants in these countries, the phenomenon could lead to serious social problems.

a.3.6. Distribution by occupational category, sector of activity and education level

In an analysis of the situation of North African immigrants on the employment market of traditional immigration countries, we must take into account the fact that, while a proportion of these workers have actually immigrated, the rest belong to the generations born of the first immigrations, and who have kept a nationality other than that of the host country.

The structural nature of unemployment and the economic crisis in Europe have made these foreigners more vulnerable to workforce cutbacks in industry, and given rise to a significant increase in foreign labour in the tertiary sector (OECD, 1993).

Economic changes have in general weakened the position of immigrant labour on the employment markets of the host countries and given rise to unemployment rates well above those of nationals. In France, the unemployment rate for North Africans rose from 13 per cent in 1980 to 30 per cent in 1992. In particular, the unemployment rate for North Africans in 1992 - which was 9.5 per cent for nationals - was 29.2 per cent for Algerians, 28.2 per cent for Moroccans and 33.8 per cent for Tunisians. This same rate was 29.9 per cent for Turks. If we consider the 15-24-year age group alone, the unemployment rate, which was 20.3 per cent for nationals, was 44 per cent for Algerians, 49.4 per cent for Moroccans and 69 per cent for Tunisians. Unemployment also hits many foreign women, partly because they are often unskilled workers, a category particularly affected by unemployment. Among French women, the unemployment rate is 12.2 per cent (compared with 7.3 per cent for men). The unemployment rate among North African women, which is higher than the unemployment rate for active foreign women from countries outside the EU, was 38.4 per cent for Algerians (26.3 per cent for Algerian men), 45.7 per cent for Moroccan women (27 per cent for men) and 50.9 per cent for Tunisians women (28.7 per cent for men) (INSEE, 1996). The discrepancy between the unemployment rates for the women of the three communities depends on the different rates of women's participation in active life. In the Netherlands, in 1994, the unemployment rate was 6.4 per cent for Belgian nationals but 31 per cent for Moroccans and 36 per cent for Turks, which represents the highest unemployment levels of all immigrant populations. At the same time, in this country, the Turkish and Moroccan populations showed the lowest rates of participation in active life. As a result, only 40 per cent of the Turkish and Moroccan population between the ages of 15 and 64 is active, and one third is unemployed (Muus, 1996).

The socio-occupational structure shows that North Africans working in Europe are generally low-skilled. This is true above all in the recent immigration countries, while in other countries they have obtained semi-skilled jobs leaving the way open to new immigrant populations, legal or irregular. For Europe in general, the number of seasonal and temporary workers has increased, especially in certain sectors such as agriculture and construction.

Employment trends in the different sectors of economic activity during the 1983-1991 period show, for Europe as a whole, but especially for France and Belgium, a decline in foreign labour in the manufacturing industries, whereas it increased in the services sector (OECD, 1994). This development corresponded to a qualitative change in the North African presence in Europe: from an immigration strongly marked by remunerated employment to an immigration characterized by a sizeable number of self-employed workers and individuals working in the tertiary, if not the advanced tertiary, sector. This evolution was accompanied by an increase in the precariousness of their employment.

In France, the most important sectors for North Africans in 1994 were the trade services, in which 38.5 per cent of employed North Africans worked, and industry, in which 26 per cent had jobs. This situation reflects a trend which parallels the situation of all immigrants, in relation to 1975 when the former sector employed 18.9 per cent and the latter 42 per cent of North Africans who had work (Lebon, 1995). In the Netherlands, 49 per cent of Turkish and 37 per cent of North African employees worked in the "Mines, industries and public services" sector (Muus, 1996).

In Italy in 1994, we see that of the entire immigrant population - all origins combined - 76 per cent of the workers had no educational qualification; those with university degrees represented no more than 3 per cent of the total; 76.4 per cent of immigrants were unskilled workers. Besides, 19.5 per cent of immigrants work in agriculture and 43.8 per cent in industry (Censis, 1995).

The North Africans who have settled in Italy are low-skilled and considered as a "jack-of-all-trades" community: they are employed as labourers in the farm-produce and construction industry. Small and medium-sized metallurgical and manufacturing enterprises also provide them with work, especially in the North, Piedmont and Lombardy. They are also employed in agriculture. They are generally paid by the day or piece. North Africans are also in evidence in street trading, as pedlars or stallholders. The catering, transport and maintenance sectors also provide openings. As for the women, they work as cleaners (Labib, 1996). Even when employed in large enterprises, the North Africans have unskilled jobs, in general in conditions of precariousness or underemployment. However, even if their work is in general precarious, a distinction must be made between immigrants with a more stable job in industry in the north of the country and those more "mobile" immigrants, who operate in street trading and seasonal work in agriculture in the south.

In Spain, 85 per cent of work permits issued to North Africans concern the category of dependent employees; 25 per cent of these workers are employed in agriculture, 10 per cent in industry, 21 per cent in construction and 40 per cent in the services. North Africans represent 83 per cent of immigrant workers in agriculture (Ministerio de Asuntos Sociales, Direccion General de Migraciones, 1994).

a.4. Flows of North Africans

Figures on migration flows are shown in Tables a.12 to a.16. In France, Belgium, Germany and the Netherlands, after the change in immigration policy in 1973-74, the flows of immigrants from the Maghreb countries were drastically reduced. For 1990-1992 onwards, we see that the volume of these flows had diminished or stabilized by comparison with these of the preceding years because of the lower number of entries under the family reunification procedure. The decline in immigration to Europe after 1990 is particularly apparent in the case of the flows of North Africans and Turks to the Netherlands (Muus, 1996).

In France, but also in Belgium, Germany and the Netherlands, family reunification is the most important element in entries on a permanent basis. Worker recruitment has not been suspended, but new arrivals are relatively limited.

A detailed analysis of the composition of the flows is possible, however, only in the case of France (Table a.16), which counts entries according to status. In 1991, workers accounted for no more than 4 per cent of Moroccan and Tunisian immigrants, whereas they represented 70 per cent at the beginning of the seventies.

We have no figures on the immigration flows to Italy and Spain. Given that before the first regularization, admission of foreign workers was not explicitly regulated, and it was not until the passage of a law designed to control migration flows that the first statistical data were produced. An analysis of the situation in these countries can therefore be based only on data relating to numbers of immigrants, fully realizing that an assessment of immigration on the basis of quantitative trends in regular immigrants is not truly representative of the real migrant flow. At any rate, we know that, since the eighties, Spain and Italy have had major immigration flows from the Maghreb. From the nineties onwards, stricter frontier control measures have been introduced, though it is not yet possible to determine their effectiveness.

a.4.1. Family reunification

While the principle of family reunification is recognized by all European States, the specific conditions associated with its application may vary. National regulations governing such authorizations have, in recent years, been modified with a view to restricting the number of family members entitled to it and to stiffening conditions of admission. There is need for greater harmonization of regulations at European level, as it constitutes an inevitable stage if free movement of immigrants within the Union is to become a reality.

In the case of France, family reunification is authorized only if the application is submitted to the foreign agencies of the OMI, and this makes it impossible to enter French territory as a tourist and subsequently apply for regularization. This regulation does not exist in the other host countries. In Tunisia, the OMI agency is the Office des Tunisiens à l'étranger, which monitors and records departures of families to France, though it cannot do so in the case of other destinations.

The Maghreb countries consider that a more liberal policy in respect of family reunification could be adopted without causing the Europeans concern. They consider not only that the "maximum theoretical potential" of family reunification would soon be reached, but also that family reunification could have positive effects on the immigrants' social integration, which also appears to be what the European countries want.

The phenomenon of the decline in the number of entries under the family reunification procedure, which has been apparent since the beginning of the nineties in the older immigration countries, could have two causes. The first might be the restrictions imposed to limit the scope of this entitlement, and the second - we shall be able to verify it if the phenomenon is confirmed in the years to come - might be that family reunification and the creation of families (by marriage, which presupposes immigration of the future spouse) are losing their importance. The Tunisian authorities have confirmed this second phenomenon, since they consider that Tunisian family reunification, which for the most part involved migration to France, is beginning to come to an end. Indeed, according to the Office des Tunisiens à l'étranger, families that wanted to and were in a position to join the emigrant worker have already done so, the others having chosen to remain at home. Moreover, once the children are integrated into the Tunisian education system, it is less easy for the families to emigrate.

While there are no figures available concerning the flow of workers and their families in Italy, we have been able to observe that, while up till recently the flow consisted almost exclusively of male workers, women and their children are now beginning to join the heads of families.

a.4.2. Seasonal workers

Some foreign immigrants are seasonal workers. Seasonal workers are temporary workers whose work, depending on the rhythm of the seasons, compensates for temporary labour shortages in a given country. Seasonal workers arrive in the host country with a fixed-term employment contract, which specifies the employment and the employer. These workers must leave the country once their contract expires. In this way, the labour market in the host country ensures that manpower needs in certain sectors will be met, the sectors in question being construction, the hotel and catering trade and agriculture, which are traditionally subject to seasonal fluctuations.

The possibility of seasonal work is already provided for in the European national employment market system. Moreover, there are a number of bilateral agreements that facilitate recourse to this type of manpower. Agreements have been concluded since 1963 between France, on the one hand, and Morocco and Tunisia, on the other, whereby the duration of residence may not exceed six months.

Seasonal immigration increased sharply during the seventies as a substitute for permanent immigration of workers, but it started to decline from the eighties onward. Whereas an annual average of 12,600 Moroccan seasonal workers worked in France during the 1972-1981 period, the figure was as low as 4,000 in 1990. Seasonal workers have partly been replaced on the labour market by immigrants in an irregular situation.

In the case of several host countries, this temporary migration appears to be a means of stopping clandestine immigration, though without allowing immigration for the purpose of permanent or definitive settlement and the consequences that such entails, especially additional expenditure in connection with the need to develop a social policy and adopt integration measures (OECD, 1995).

a.4.3. Composition of flows in terms of socio-economic and educational status

While North Africans who emigrated in the sixties and seventies had a low level of education, the general development of education systems in the Maghreb has led to higher educational levels among the migrants. It should be noted as well that workers who emigrate have a high level of education, because only highly qualified workers have the possibility of emigrating legally.

The trend towards the increase in movements of skilled workers has changed the nature of worker migration. Recognition of the importance of skilled worker migrations partly underlies the decisions of certain OECD countries to increase the number and proportion of skilled migrants in the total of new immigrant worker entries. In several European countries, the proportion of skilled workers to the total number of entries of new workers continues to increase (Garson, Puymoyen, 1995).

Of North African active immigrants in France in 1994, 58 per cent were wage-earning employees. This percentage is lower than that for immigrant workers from French-speaking Black Africa, of whom 97 per cent were wage-earners (Lebon, 1995).

In Italy, the immigration flows consist of young educated persons from the large towns, but also of uneducated persons from rural areas. While workers who migrate to southern Italy tend to have very low education and vocational training levels, those who go to the northern regions tend to be young graduates and above all technicians and semi-skilled workers.

a.4.4. Classification according to form of movements in terms of status

Classification of migration movements must be considered in a dynamic way, especially in the case of flows involving North Africans linked with European countries not only economically but also culturally. A migrant may enter a country temporarily and subsequently acquire a permanent status, or undertake training and subsequently obtain an employment contract. Classifications can also overlap according to status.

Several factors have led to the development of new classifications of movements. For example, there were the changes following the limitation of types of migration flows for economic reasons, which characterized the sixties and seventies, the increase in international trade which led to the movement of workers, or the new international regulations concerning the export of services. Available statistics on the flows do not, however, allow us to define the temporary or permanent status of immigrations. Since the beginning of the nineties, the host countries appear to have displayed a preference for temporary movements, which allow them to increase the selectivity of the flows according to labour market needs.

Migration for purposes of training, even though it does not always concern the active population, has an economic motive. Candidates are invited to spend a certain amount of time in an enterprise to acquire skills or familiarize themselves with new technologies. In France in 1994, out of 7,100 North African temporary immigration entries, 1 per cent were trainees.

Trade liberalization, together with the introduction of new technologies and the demand for more flexible and versatile human resources, encourages mobility among highly skilled workers. Liberalization in the provision of services could lead to movements of workers and intensify temporary manpower migrations (Garson, Puymoyen, 1995). Indeed, the trend towards globalization of trade and investment will have the effect of increasing the mobility of management personnel and technicians.

Free-trade agreements between the European Union, on the one hand, and Tunisia and Morocco, on the other, envisage as an objective companies' right of establishment and liberalization of the provision of services. If measures were to be adopted in the future to attain this objective, the Mediterranean region could become a privileged zone in respect of the services trade. In the meantime, the scope of such provisions is defined by the obligation imposed by the general agreement on the services trade.

Within the framework of their programme to revive placement of manpower abroad (Ministry of Vocational Training and Employment, 1990), the Tunisian authorities want to readjust the organization of this placement and develop a new and more dynamic policy and an active approach on the economic market. According to this policy, the export of labour should be subject to the same constraints in respect of cost, quality and observance of time limits as the export of goods. For the Tunisians, it is a question of placing themselves in the field of skilled and highly skilled workers, technicians, middle and senior management, whose situation in terms of remuneration and other advantages are decidedly better and much more acceptable to the workers.

The Tunisian Government wants to take advantage of the opportunities of placing workers abroad within the framework of services exports by Tunisian enterprises, and to make greater use of the possibility of international subcontracting to carry out projects in the Gulf States for foreign, especially European, companies.

Trade liberalization could, in the long term, lessen migration pressure, as a result of development in the countries of departure, while increasing workforce mobility.

a.4.5. Length of period working abroad in the case of North African migrant workers

Before the closure of frontiers, migration movements for economic purposes between Europe and the Maghreb were frequent and of short duration. Because of migration networks and geographical proximity, from the years 1973-74 onwards, workers who decided to remain or who had been joined by their families remained for good or for a long period. It was the policy limiting the possibility of going to and coming from Europe easily to do a job which drove the migrants to extend their stay and contributed to giving it an often definitive nature.

Since the beginning of the nineties, the host countries seem to have wanted to give a fresh boost to temporary immigration.

a.5. Migrants in an irregular situation in respect of conditions of entry, residence and work in force in the immigration countries

Irregular immigration is not new. Since the fifties, and above all the sixties and seventies, this phenomenon has existed concurrently with controlled migration, and followed the patterns and networks of legal immigration of workers and their families. However, it took on an unprecedented scale after the closure of frontiers to regular migrants.

With the crisis, the irregular immigrant, who had previously been appreciated for the inestimable advantages he offered from the point of view of flexibility and availability, was seen as an outlaw who threatened public law and order. Having enjoyed the image of the "useful" worker, the illegal immigrant saw himself treated as a delinquent (Marie, 1988).

The situation of irregular immigrants is especially well illustrated in southern Europe, which had not previously known immigration flows and which has been confronted with a major development of clandestine immigration since the eighties. The countries where this phenomenon is most apparent are characterized by the specific role played by workers in an irregular situation in the operation of the parallel economy.

By its very nature, clandestine immigration remains difficult to define or quantify, all the more so as the status of migrants can change with time, and indeed this is generally the case. None of the policies pursued by the host countries has made it possible to put an end to this phenomenon. Most countries fear, in fact, that this form of immigration will become more prevalent, since they do not intend to open their frontiers to large groups of regular foreign workers.

The life of clandestine immigrants revolves around their purpose in coming to Europe. Moreover, the status of illegal workers affects their living conditions and their relations with the institutions of the country of residence, be it in respect of quality of housing, the possibility of having a family life, or the amount of savings sent home.

a.5.1. Definitions

One of the major obstacles to obtaining estimates of the population residing illegally in Europe is the problem of definitions. Estimates often concern illegal workers or illegal residents, two categories that do not coincide. Furthermore, given that each European country has its own laws concerning immigrants, their entry, residence and employment, what is illegal in one country may be legal in another.

We must make a distinction between:

- a) illegal or clandestine entry, in a case where the immigrant is not in possession of the documents or permits required by the law of the country into which he is entering;
- b) illegal residence, in a case where the foreigner is residing in a country without the authorizations required by law, because he has entered the country clandestinely and not regularized his situation, or because he has remained in the country after the expiry of such authorization as a tourist visa or resident permit;
- c) illegal work, in a case where the foreigner legally or illegally residing in the territory of a country is working there without the requisite authorization.

The first two categories concern illegal immigration situations, whereas the third applies only to illegal work. In reality, the majority of illegal immigrants enter the country legally, with a tourist or seasonal worker visa. By remaining in the country after the expiry of such authorizations, these immigrants place themselves in a situation of illegality.

a.5.2. Data

While statistics on the migration flows are few enough as it is and not totally reliable, migrants who find themselves in an irregular situation are not, by definition, counted among migrants officially registered by the control systems. Statistics needed to assess the number of migrants in an irregular situation are not very reliable, if not non-existent. For this reason, there is no assessment of the number of immigrants in an irregular situation in Europe, clandestine immigrants most of whom are in the new immigration countries.

Though we are not in possession of precise figures, we can nonetheless give a rough estimate, which must be considered with caution. Estimates have been made on the basis of regularizations, expulsions and surveys. In Western Europe, the number of residents in an irregular situation, all nationalities combined, was estimated in the eighties at 2.6 million, whereas legally resident foreigners numbered some 15.4 million (Böhning, 1991). The proportions of clandestine and legal residents vary considerably according to country of origin and country or even region where the immigrants have settled. In the southern European countries, in particular, the presence of immigrants in an irregular situation is far from insignificant. It has been estimated (ISOPLAN Reports, EEC, 1989) that, in the Southern countries, especially in Italy and Spain, but also in France, Portugal and Greece, 1.5 million immigrants were in an irregular situation in 1988, whereas there were 1.2 million regular foreigners. This should represent a global figure for 1988 of 540,000 North Africans scattered throughout France, Italy, Spain, Portugal and Greece.

It would appear that, for Europe as a whole, Italy presents the largest community of illegal immigrants in terms of absolute numbers. These immigrants numbered between 350,000 and one million in 1987, and between 600,000 and 1.4 million at the beginning of the nineties.²² In this country, a cautious estimate by the Censis, drawn up for 1994 for all foreigners from developing countries, indicates the number of irregular and clandestine foreigners in the territory equivalent to about 30 to 40 per cent of the total number of residence permits issued (Censis, Rome, 1995). With regard to immigrant workers, it would appear that in Italy 57 per cent of these workers, all geographical origins combined, are in an irregular situation, and this proportion is 70 per cent in the south and 90 per cent on the islands. Again, for the Italian South and islands, 80 per cent of immigrant workers employed in agriculture are in an irregular situation.²³

While these estimates refer to all the various immigrant populations, it has nevertheless been observed that irregular immigration in Europe mainly concerns the Arab countries of North Africa, especially the Maghreb countries. The major proportion of these irregular immigrants are Tunisians (Italy, France), Algerians (France), Moroccans (France, Spain, Italy and Portugal), but also Egyptians and Libyans (Italy, Greece). This is corroborated by the fact that, of all the immigrant communities, the largest numbers of foreigners to apply for regularization were Moroccans and Tunisians in Italy, and Moroccans in Spain.

These estimates concerning immigrants in an irregular situation are to be considered with caution because, in the past, after the regularizations, it appeared that the estimated figures previously advanced by no means corresponded to the reality.

a.5.3. National policies

The reaction of European countries to the flows of illegal immigrants found expression in increased frontier controls, selective expulsions and regularizations. The regulatory intervention of Governments, which decide what is legal immigration and what is not, applies to a complex and dynamic phenomenon. All the various international migrations, legal and illegal, constitute a worldwide phenomenon which follows a partially autonomous process, acting and reacting to the control measures of governments. This highly complicated situation explains why government measures do not always produce the expected results or why they can have perverse effects.

The laws concerning regularization in Italy revealed the size of the Maghreb community hitherto concealed by its clandestinity. These laws provided countries their first juridical texts on the subject and allowed the regularization of hundreds of thousands of immigrants of all nationalities who had no residence permits and were therefore not included in statistics. The laws did not, however, make it possible to break the vicious circle in which many illegally employed foreign workers are trapped. Illegally employed immigrants cannot supply proof of an income, and, for that very reason are not officially entitled to rent accommodation. However, a contract of employment and a rental lease are necessary for the renewal of a residence permit. Even the more flexible procedures introduced by the circulars have not produced the expected results: immigrants, fearing reprisals, avoid revealing the identity of their employers and thus forgo the possibility of having their residence permits renewed (Labib, 1996).

Eventually, the feeling of vulnerability induced by the flows of illegal migrants drives the political authorities to consider this phenomenon negatively according to criteria of a social and political rather than an economic nature. The economic criteria return to the fore, however, when the political authorities decide to turn a blind eye to the irregular situation of residents employed as illegal workers.

a.5.4. The labour market

The bulk of clandestine immigration concerns workers in an irregular situation. The dynamics of this immigration are complex. The supply of labour on the part of clandestine immigrants creates its own demand, which, in turn, stimulates illegal immigration through the migration networks.

It is, however, important not to minimize the role of certain employers in the introduction of clandestine labour, since, despite increasing unemployment, many enterprises in Europe now depend on illegal migrant workers, wage-earning or seasonal, who provide a cheap and flexible workforce, willing to perform unskilled jobs and in hard working conditions. Certain enterprises would not even exist were it not for this type of workforce, and others owe their expansion to this flexibility.

This reality is borne out by the fact that the regularizations effected in Europe have not reduced clandestinity. Many immigrants lost their jobs as soon as they asked their employer for a contract, a preliminary requirement for regularization. Others, fearing they might lose their job, preferred to remain in an irregular situation, and a large number of "convenience" or "compliance" contracts were broken once the immigrant's situation had been regularized.

²² Council of Europe, Mediterranean Conference on Population, Migrations and Development, Palma de Majorca, 15-17 October 1996, First Round Table: "North-South Migrations: recent trends and future perspectives", by J.J. Schoorl, B.J. de Brijn, E.J. Kuiper and L. Heering.

²³ Censis, based on the findings of a survey conducted in 1995 on 18,475 workers, *Foreign immigration in Italy*, Sopemi 1995 (Rome, November 1995).

New migrants are being attracted by the jobs made vacant by those who have been regularized. Thus, employers are replacing immigrants who are seeking regularization with new clandestine workers. Moreover, as soon as immigrants succeed in stabilizing their situation, they look for better paid and less degrading employment, leaving their former jobs open to new candidates. This trend shows that all the various factors such as the employment situation, the workers' aspirations and the political choices of governments encourage upward mobility in workers at the lowest levels, and their replacement by new immigrants (for a general historical approach to the question, see Böhning, in Böhning and Zegers de Beijl, 1996). This phenomenon would however disappear if new flows were not ensured.

An illustration of this phenomenon can be found in the Italian situation. The immigrants who regularized their situation under the terms of the two laws of 1987-88 and 1990-91 promptly left the low-paid precarious jobs available in the south of the country to move up to the industrial North. Today, vast communities of legal immigrants are settled in the principal towns of Northern Italy, where they have been able to take advantage of a favourable economic situation and a demand for cheap unskilled labour in small and medium-sized enterprises (metallurgy, ceramics, tanning, footwear, garment industry etc.). Regularizations and the job market in the south of the country attracted new immigrants, who arrived after the regularization procedures had been suspended and who are now in an irregular situation. They work illegally as peddlers, seasonal agricultural workers, fishermen or wage-earners in clandestine workshops or in construction.

The situation is, however, so complex that it would be illusory to believe that the abolition of regularization has solved the problem of clandestine immigration. Eventually, we can say that the situation in Europe today - especially in Southern Europe - in respect of irregular immigrations differs from the experience of other regions or other eras, and that this makes any comparison next to useless.

According to Tunisian experts, the institutionalization of precarious employment in Europe, the fact that it is developing a positive image, and that it is accepted by European workers and legally resident foreign workers, have largely contributed to the reduction in demand for illegal foreign workers. Another segment of the demand for illegal workers is met by a system of temporary contracts and service contracts. Moreover, the sharp decline in irregular employment will result to a large extent in the severing of the migration chains and further reduce immigration possibilities in Europe.

a.6. Requests for political asylum

The number of persons seeking political asylum in Europe has increased since the eighties. It would appear, however, that it has begun to decline, at least in the case of certain countries, since the mid-nineties. This first upward trend is considered to be due above all to the growing number of economic migrants using this device in order to enter countries that were closed to all other forms of legal immigration or to obtain temporary regularization. This idea was supported by the high proportion of rejected requests (85 per cent in France). However, in the context of the debate on this issue in France, it has been observed that, with very few exceptions, asylum seekers did not come from traditional emigration countries such as those of the Maghreb. Between 1981 and 1993, only 4,171 asylum applications from nationals of Maghreb countries were submitted in France, two thirds of these since 1991 (Legoux, 1995). This relatively small number may be due to two factors. On the one hand, thanks to extremely efficient migration networks, North Africans have other means of settling in Europe and, on the other hand, they want to avoid a complete break with their country of origin, which refugee status would involve, and to maintain the possibility of travelling between the Maghreb and Europe.

The situation is, of course, different in the case of Algeria because of the rise of political extremism. The number of Algerians that have requested asylum in France multiplied by 12.5 in four years (191 in 1991, 618 in 1992, 1,098 in 1993 and 2,385 in 1994) (Lebon, 1995). In 1994, Algeria was in second place among the principal countries of origin of first-asylum seekers, representing 9 per cent of all asylum applications. This country has, none the less, registered the lowest rate of acceptance of such requests, due to the fact that French jurisprudence tends to reject applications from persons persecuted not by the State or a de facto authority, but by groups that are independent of the State (Legoux, 1995). Consequently, refugee status is almost automatically refused in the case of Algerians. Two elements currently oppose a modification of this rule and the recognition of Algerian asylum seekers. The first is the number of potential refugees, which is considered to be extremely high and likely to upset the desired migration balances. The second is more a question of inter-governmental policy: to grant the status of refugee to victims of terrorism is tantamount to admitting that the Algerian authorities are no longer capable of protecting their nationals and that there is therefore, as it were, a power vacuum in Algeria (Legoux, 1995).

Bearing in mind the present political situation, there could be, in the future, an increase in the number of manifestly founded asylum applications in Europe, especially in France, not only from Algerians, but also from other nationals of Maghreb countries.

The Turkish case is very different. Since 1981, Turkish asylum seekers have accounted for up to two thirds of European applicants. This relative importance increased until 1989 and, for the 1989-1991 period, Turkey headed the list of countries of origin (European and other) of first-asylum seekers. However, from 1989 on, there has been a decline in the number of Turkish applicants. This decline is associated with measures designed to shorten the time allowed for decision by the French authorities, and with the abolition of the asylum seekers' automatic right to work. To a far higher degree than in the case of most other nationalities, it has given substance to the idea that Turkish applications were particularly unfounded. We can see, however, that a quarter of the Turkish asylum applications have resulted in recognition of refugee status. While it is relatively low, this proportion is still twice as high as, for example, the proportion for Africa as a whole (Legoux, 1995).

a.7. The phenomenon of returns to country of origin

The incentive policy that European countries (France, Germany, Netherlands) have pursued since the seventies, with a view to returning immigrants to their countries of origin, was considered initially as a solution to the crisis that affected the immigrant workforce in particular. The repatriation policy has, however, proved disappointing (Wihtol de Wenden, De Tinguy, 1995).

Several economic and social factors have led to the demise of the myth of return - return being considered as the completion of economic migration. These factors include: poor economic prospects in the countries of origin, the comparison between living standards, and finally, family reunification and hence the formation of social bonds in the host country. Furthermore, the closure of the European frontiers and the impossibility of returning to Europe have discouraged North African workers from trying the experiment of return to their country of origin.

While the number of North Africans that returned home was sizeable up to the mid-seventies, returns have subsequently been limited in number. Though there are no available statistics, bearing in mind that definitive returns are not recorded, we none the less have figures on returns, culled from return assistance programmes. Not only has the number of returnees been meagre, but certain persons who had left for their countries of origin have since come back, sometimes even clandestinely, as one of the conditions of return assistance was the handing-in of residence papers.

In France, the various devices (return assistance and the Franco-Algerian Agreement) have, in the 1977-1984 period, attracted only 53,00 Algerians, 5,700 Moroccans and 7,500 Tunisians, most of whom were approaching retirement age. Algerians in France have proved very hesitant with regard to these policies directly concerning them, since the loss of social benefits incurred in the event of return would by no means be offset by the amounts provided for by return assistance. In the period 1984-1994, the reintegration assistance system was availed of by 24,500 Algerians, 8,100 Moroccans, 5,000 Tunisians and 11,200 Turks. In conclusion, while, in the 1977-1984 period return had attracted some 13,000 North African workers on average per year, in the period from 1984 to 1994, an annual average of 3,000 returnees were attracted, which is very low compared with the size of this community.

These figures corroborate the existence of a clear tendency of migrant workers and their families to settle for good in the host countries, as well as the fact that North African emigration, seen originally as a temporary solution, has subsequently become definitive, turning into a mass migration.

On the basis of the experiences of the seventies and eighties, the European countries are now convinced that the policy of return assistance has no impact on migration flows, and these policies are thus considered obsolete in the European Union member States.

a.8. Comparison with flows towards other regions

Europe is not the only destination for emigrants from the Maghreb. However, since 1974, no regular outlet has been found, and, while the Gulf States presented encouraging openings, no real, lasting or promising breakthrough has been registered. At present, about 90 per cent of Moroccan and Algerian emigration flows are directed towards Europe. The bulk of these flows could have nowhere else to go, since they consisted of family members who, by definition, were coming to join the heads of families already long established in these countries. The flow of illegal immigrants was also directed towards the European countries, discouraged as they were by the strict regulations concerning immigration and employment in the Gulf States.

Even while migrations of workers to Europe were diminishing, in 1973-74, those directed towards the oil-producing Gulf States were escalating. The economic boom in the Gulf States, due to the increase in oil prices, had the effect of increasing their demand for foreign labour. Several inter-Arab agreements and documents were signed, insisting that labour-importing Arab countries should give priority to Arab workers. Up to the end of the seventies, these latter made up the bulk of entries of expatriate workers into the Gulf States, but hopes that these flows would increase were disappointed. During the eighties, the Gulf States deliberately attracted Asian nationals, and the North African workers were discriminated against economically and politically vis-à-vis these new flows. Economically, because many nationals of Asian countries were willing to work for lower wages than those accepted by expatriate Arabs, and politically, because the Gulf States wanted to avoid the possible repercussions of a massive presence of workers from Arab countries. Besides, this emigration dropped during the Gulf Crisis. Since this experience, the labour-exporting Arab countries still fear the return of their workers and even the loss of the money earned. Even though limited in number, departures have none the less been resumed since 1993.

Despite the conclusion of agreements concerning labour and the deployment of certain resources for labour recruitment, the number of departures is still low. The economic structures of the Gulf States are such that the Government does not intervene in matters of foreign labour recruitment, and employers and professional organizations are free to choose the origin of their workforce according to the imperatives of cost-effectiveness and management. Consequently, the brand image of North Africans and the relations cultivated with the Maghreb countries will only apply in the case of equal comparative advantages.

The current privatization process in the Gulf States since the beginning of the nineties has resulted in wage reductions in large public works enterprises and in health care structures, where most of the North Africans were employed.

The Heads of State of the Maghreb Arab Union (MAU), in January 1990, clearly stated their intention of making the question of Maghreb emigration a collective responsibility of the MAU. This statement, which could contribute to revitalizing serious discussion with a view to finding solutions at regional level, has not been followed up.

a.8.1. The Tunisian case

Relatively speaking, Tunisia is an exception from the point of view of the direction of Maghreb emigration flows, which tend to be towards Europe. According to Tunisian statistics (Office des Tunisiens à l'étranger, 1994), the number of Tunisians abroad amounts at present to 675,00, of whom 554,500 (82 per cent) are in Europe, 42,200 (6.2 per cent) in Libya, 31,700 (4.7 per cent) in other Maghreb countries or in Mauritania, 32,600 (4.8 per cent) in other Arab countries - mainly in Saudi Arabia, Syria and Oman - and 13,700 (2 per cent) in America, especially in Canada and the United States. While the number of Tunisians residing in other Maghreb countries diminished in the nineties, it has increased in other regions, and especially in America.

The case of Tunisians in Libya is particular and difficult to estimate quantitatively, since it consists mainly of cross-border migration. According to other Tunisian statistical sources (National Institute of Statistics (INS), 1994), there are 40,000 regular, and as many irregular, expatriates in Libya. Because of its geographical proximity and its employment potential, Libya has been considered since the sixties as a major partner of Tunisia. Despite political problems, it is still important today for Tunisian worker emigration - especially for unskilled workers - and this in spite of periodic crises, of which the workers are the first victims (Ministry of Vocational Training and Employment, 1994).

Tunisian emigration to Libya increased rapidly in the seventies, in respect of both controlled and clandestine emigration, and it has fallen considerably since the eighties. With regard to controlled emigration, there was an increase from an annual average of 1,819 departures in the 1965-1969 period to 9,635 in the seventies, falling to 1,659 in the eighties, and 137 departures in the period between 1990 and 1993 (Office des Tunisiens à l'étranger, 1994).

The opening-up of the Libyan labour market to Tunisian workers has always followed the vicissitudes of Libyan politics, and this market cannot be considered as an assured or expanding outlet. For this reason, the number of Tunisians in Libya has fluctuated considerably and their stay there has always been of short duration. Tunisian workers, with other immigrants, have often been suddenly expelled: 29,000 in 1969, 43,000 in 1972 and 32,000 in 1985.

These expulsions, without advance warning and without consultation with the workers' countries of origin, were accompanied by restrictions as to the amount of money or goods that the workers could take with them. Libya thus created a precedent in the matter of getting rid of foreign workers in the event of a reduction in the demand for labour (Wihl De Wenden, De Tinguy, 1995).

In the Gulf States, Tunisian workers represent less than 1 per cent of all foreigners working in that region (Ministry of Vocational Training and Employment, 1990). This emigration consists mainly of skilled workers. Let us look in particular at emigration to Saudi Arabia. In the 1976-1979 period, there was an average of 122 departures per year, compared with 321 in the eighties and 45 in the years between 1990 and 1993 (Office des Tunisiens à l'étranger, 1994). Emigration towards the Gulf States seems to have revived in 1994, with 136 departures to Saudi Arabia, 25 to Kuwait and 6 to other Gulf States (Tunisian Employment Agency (ATE) unpublished statistics). These figures, which are at any rate very low, represented no more than 18 per cent of controlled emigration to European countries in 1994.

In 1990, a Tunisian plan to relaunch the placing of workers in the Gulf States was introduced within the framework of the Tunisian Technical Co-operation Agency. One of its aims was to bring Tunisian workers to the level of competitiveness required in these countries and to reduce the gap between them and the Asians. The Tunisian Government would like to launch a programme of redeployment of recruitment structures, programmes and methods, to develop flexible training and intensify socio-cultural preparation (Ministry of Vocational Training and Employment, 1990). It considers that Tunisian unskilled labour can no longer compete with that of the Asians, and therefore insists on the emigration of skilled workers. Tunisians must now concentrate on specialized, skilled and highly skilled worker categories, technicians, engineers and senior executives, in sectors such as tourism, the services, the engineering and electrical industries, health care, education and maintenance. This workforce could be competitive in the matter of wages, while having the advantage of a common language and cultural similarity.

Thanks partly to a programme to boost emigration of skilled workers, Tunisians working abroad for the Tunisian Technical Co-operation Agency increased sixfold during the 1980-1994 period, reaching a peak at 7,100 individuals. The most common postings are to Saudi Arabia, Oman, the United Arab Emirates and Qatar. Among the sectors covered we find education and health care, which employ 37 per cent and 29 per cent respectively of the total number of Agency expatriates (unpublished statistics). The vocational training sector has diversified since the eighties, and the number of highly skilled individuals has increased with the departure of engineers, doctors and university teaching staff.

However, as regards both individual departures and collective departures with an enterprise, Tunisia is placed at a severe disadvantage owing to competition not only from Asian countries but also from Egypt and Jordan. Living standards in Tunisia have risen, and highly skilled specialists' salaries are considered to be very high. Tunisian workers with a high level of training and work experience - required for expatriation - no longer find it worth while to move to the Gulf states. At the same time, the education system in Egypt and Jordan is beginning to produce a surplus of specialists in relation to domestic requirements, while wages are still low. For Egyptian and Jordanian, but also Moroccan, workers, the gap between the wages paid their country and those paid in the Gulf States is still wide enough to provide an incentive to move there.

As a result of these constraints, to which can be added a rejection of the particular lifestyle of these countries, the agency recruiting Tunisians for employment abroad is often unable to find applicants for jobs in the Gulf States or Libya, and future prospects are not bright.

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