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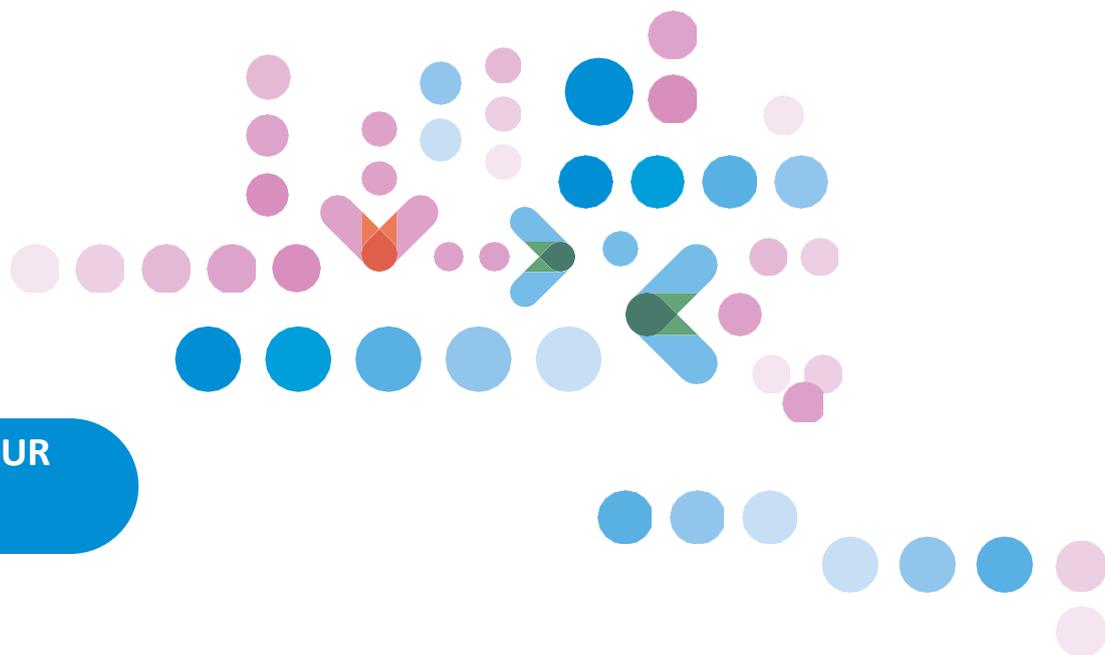
Towards a Holistic Approach to Labour Migration Governance and Labour Mobility in North Africa



January 2023

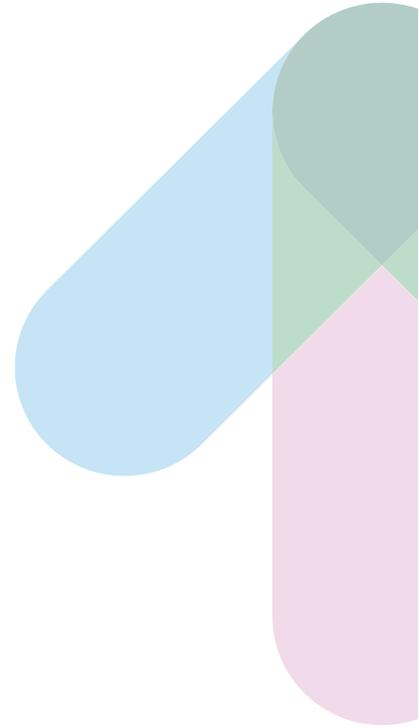
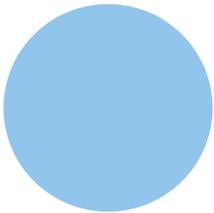
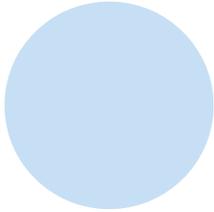
Professional mobility North Africa-Europe: The New Deal?

Inaugural Paper of the 2nd THAMM Regional Conference



Prof. Jamal BOUOYOUR
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Towards a Holistic Approach to Labour Migration
Governance and Labour Mobility in North Africa

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Comments are welcome and should be addressed to the author(s).

Suggested citation: ILO-IOM. 2023. *Professional mobility North Africa-Europe: The New Deal?*

Inaugural Paper of the 2nd THAMM Regional Conference

ISBN 978-XXXXXXXXXX



● Professional mobility
● North Africa - Europe:
● The New Deal?
●

January 2023

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EXECUTIVE SUMMARY

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The migration issue is by nature complex, because it is eminently political. It is therefore necessary to think of it holistically in order to better apprehend and transform it. The shores of the Mediterranean, South and North, offer a cartographie of this complexity, with the existence of a duality within the unit itself (unit as multiplex). Several logics (visions of the world, life in society...) can coexist, in connection with unity, without duality taking precedence over unity. Paul Valéry speaks of "the conquest of ubiquity". In a connected world where everything that happens in one place has immediate repercussions on another, one must be able to invent a new narrative conceived as a carpet whose harmonious and intertwined patterns symbolize the diversity of belongings.

Cooperation in general, and in the field of migration in particular, between the two shores is not only a matter of common sense; It is in every respect a matter of pragmatism.

On the basis of this premise, it can be said that over the last decade positive signals have been sent out by the European Commission, in terms of the political commitment to strengthen cooperation between the EU and neighbouring countries, or at least are we witnessing an awareness of the need to address the migration issue. This was achieved in 2011 with the launch of the initiative called "Mobility Partnership" proposed by the EU to its southern neighbours including Morocco, Tunisia, Egypt, Lebanon and Jordan. The focus was therefore on promoting returns and readmission and strengthening circular migration.

But in reality, there has been very little significant progress in establishing new labour migration schemes for nationals from North Africa and the European Union's migration policy has shown its limits since the 2015 migration crisis. For example, the number of first work permits for North African nationals has even

decreased in the years following the signing of these mobility partnerships.

The 2020 *Pact on Migration and Asylum*¹ gives new impetus to the European Union's migration policy. Through this Pact, the Commission proposes many changes aimed at better managing migration in all its aspects, by establishing a balanced approach, even if disagreements on migration policy between Member States remain numerous. The new pact proposes a new approach for legal migration; the Talent Partnerships, meant to *"provide a comprehensive EU policy framework as well as funding support for cooperation with third countries, to better match labour and skills needs in the EU, as well as being part of the EU's toolbox for engaging partner countries strategically on migration"*.

In the post-migration crisis context of 2015 and the establishment of the Emergency Migration Trust Fund, and while bilaterally Member States have developed various initiatives for many years, DG NEAR has set up a specific programme entitled THAMM (For a Global Approach to the Governance of Labour Migration and Mobility in North Africa) funded by the European Union and co-financed by the EU and BMZ, for a total amount of 35 million Euros. This programme is divided into two main components, one focusing on improving labour migration governance structures and frameworks and the other implementing different mobility programmes. The program has been implemented since mid-2019 in Egypt, Morocco and Tunisia. The International Labour Organization (ILO) and the International Organization for Migration (IOM) have been entrusted with the governance component, while GIZ, ENABEL and the French Office for Immigration and Integration (OFII) have been responsible for pilot mobility programmes to

¹ [https://eur-lex.europa.eu/legal-](https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52020DC0609)

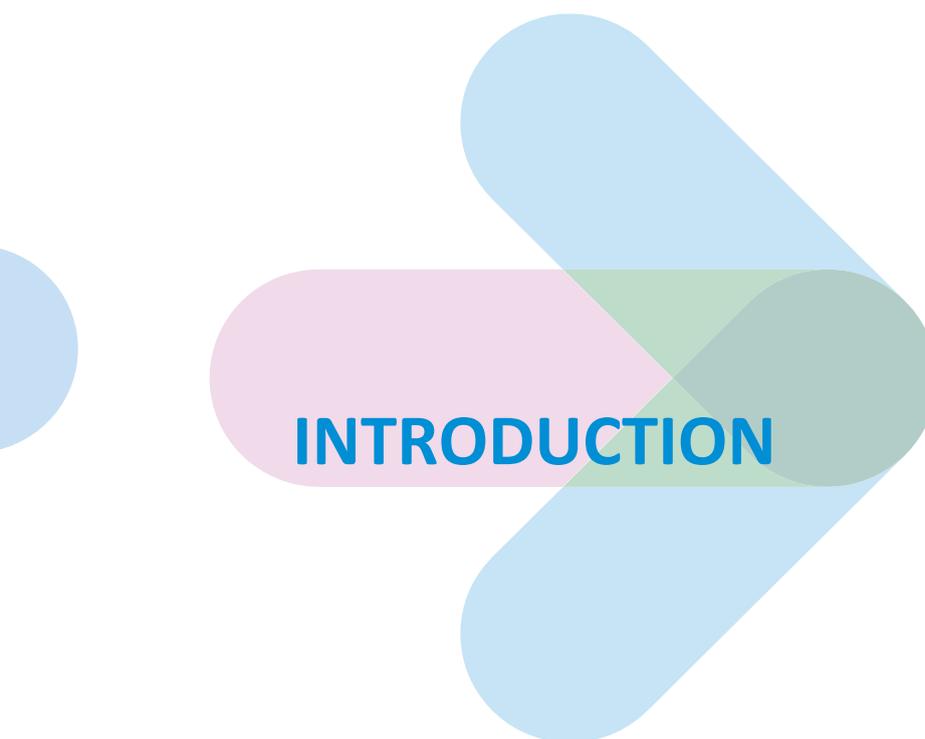
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Germany, Belgium and France respectively. One of the objectives of this programme is to enable policy makers in the region and their partners to integrate migration into national employment policies, develop coherent national strategies on labour migration and improve coordination among all public institutions. At the same time, however, it is also a question of testing new approaches to bilateral labour mobility that offer longer-term solutions to the needs identified in the Pact and subsequent Communications and which could be implemented on a larger scale in the new policy frameworks formulated subsequently (Skills Package, 2021; Communication on Talents, 2021 Teams Europe, 2022 etc).

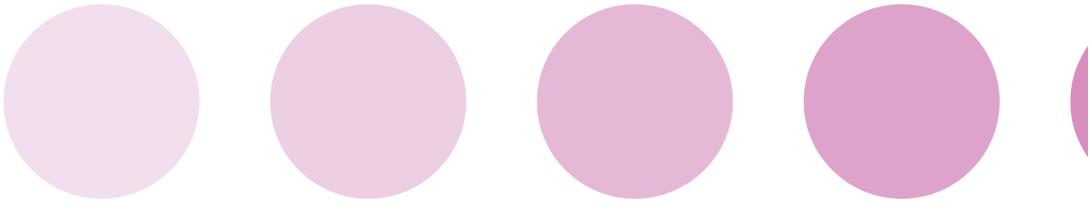
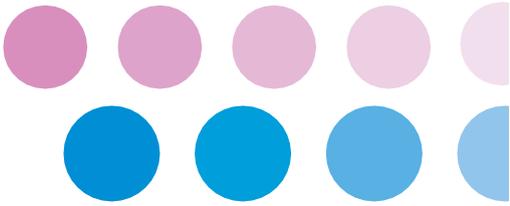
This research therefore identifies avenues and proposals that go in the direction of a great cooperation between the partners of the two shores of the Mediterranean, aiming in particular at strengthening the recognition of diplomas and qualifications of foreign skills, simplifying procedures for foreign nationals (application for work permit, issuing visas, etc.), setting up a scalable and transparent system for selecting candidates for immigration, and speeding up talent recruitment procedures by creating a Europe-wide digital platform, which can be extended to humanitarian migration.

The research paper also highlights that for mobility patterns to benefit developing countries, they need to be given more thought. In particular, to (1) ensure that the skills acquired in the country of destination will benefit their labour market while some of them are transferred to the countries of origin through skilled migrants; and (2) provide for training or further training programmes for the direct benefit of the countries of the South in order to ensure that the costs of training potential migrants are shared. The risks of skills shortages in the South will also need to be anticipated in order to bring them down to an acceptable level. This will be all the more important in strategic sectors such as health, ICT, energy

(renewable energy production, energy efficiency of buildings, electric vehicles, etc.) and circular economy (recycling, repair, etc.), given future needs. In this context, legal migration must also accompany the transition of all partner countries to a green and digital economy, which requires specific skills and restructuring of their economies and labour markets. The success of these initiatives requires the establishment of a climate of trust between partners from the South and the North, and the belief in a common destiny, while accepting the diversity of all partners and their heterogeneity.



INTRODUCTION





INTRODUCTION

Today more than yesterday, migration is at the center of all the attention of government actors, whether at the national, regional or international level. This interest has materialized in particular with the adoption in 2015 by the United Nations of the 2030 Agenda for Sustainable Development, which recognizes for the first time the contribution of migration to sustainable development, and through the establishment in 2018 of the Global Compact for Safe, Orderly and Regular Migration. In the same vein, the EU 2020 Pact on Migration and Asylum, which focuses on asylum issues but also on those related to migration management and strengthening legal channels, is a further step towards raising awareness of the importance of migration for European countries. For the latter, legal labour migration would contribute to the reduction of irregular arrivals while addressing the demographic and economic challenges facing Europe. This is essentially in relation with the aging of the population and the shortage of labour in certain sectors or occupations. For their part, countries of origin would benefit from migration through migrants' remittances and possible transfers of technology and skills.²

This paper highlights a few key points:

The first concerns, from our point of view, ethics, particularly when we approach the issue of the migration of highly qualified people, which may appear as harming the country of origin. This subject is obviously not new, but the economic literature is unanimous on the essential role of human capital in accelerating economic growth and the development of countries. Some economists proposed, in the 70s, to tax skilled expatriate workers for the benefit of the countries of origin (the "Bhagwati tax"), in order to compensate for the loss caused by their emigration and the costs of their education borne by these poor countries. This reasoning seems obsolete to us today,

insofar as mobility is a right and we cannot prevent a person, especially if they are educated and qualified, from choosing their destiny freely. But, given the loss of income of the countries of origin and the cost of training future migrants (especially the most qualified), it is important to engage objectively with the "brain drain" issue.

The second concerns in particular those European countries which do not always agree with each other, because of their divergent interests and internal pressures due to the strong hostility of European public opinion towards immigration in general. This raises the question of the degree of convergence in national policies at European level.

The third point is related to the pandemic and its deleterious economic, health and societal effects. Not only have significant labour needs emerged in certain sectors, such as health, but it has been realized that the countries of the South themselves face the same problem, with in some cases urgent needs. The COVID-19 pandemic has also revealed that in Europe as many as 13% of workers performing essential functions (doctors, nurses or drivers) are migrants.³

The fourth point concerns labour supply and demand on both shores of the Mediterranean. On the North Shore, much of the demand for labour remains unmet for several types of jobs, both high- and low-skilled. On the southern shore, the employability of young people is a major source of concern for political powers. This raises many issues related to the low level of job creation needed to meet the growing supply of labour even when the economy is growing, the poor quality of jobs created, and the low quality of education and training systems and their lack of adaptability to the skills needs of the private sector. The high unemployment rate among young graduates is partly explained by the growing supply of qualified labour, particularly in

² In the 2030 Agenda for Sustainable Development, migration is a key cross-cutting theme. Target 10.7 of Sustainable Development Goal 10, on reducing inequalities, calls on States to "facilitate orderly, safe, regular and responsible migration and mobility, including through the implementation of planned and well-managed migration policies" (<https://www.iom.int/fr/migration->

[developpement-durable-et-le-programme-2030.](https://www.iom.int/fr/migration-developpement-durable-et-le-programme-2030)

³ <https://eur-lex.europa.eu/legal-content/FR/TXT/PDF/?uri=CELEX:52022DC0657&from=EN>

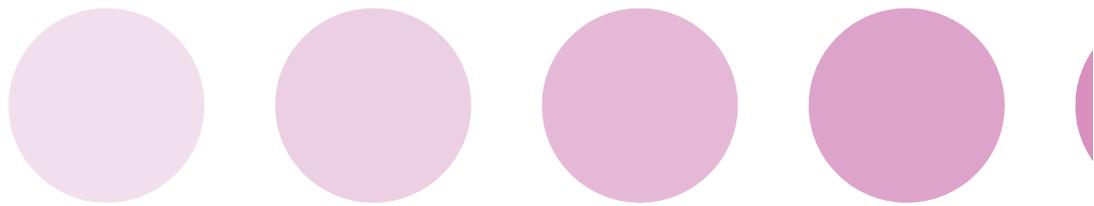
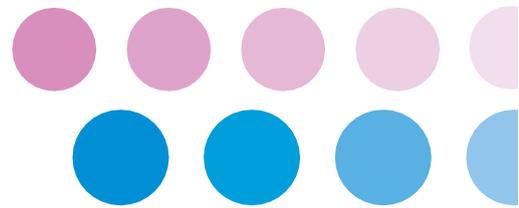
certain occupations (as a result of major efforts to expand access to higher education) and the economic fabric that has been unable to absorb this rapidly growing labour force in recent years. Even for young people with low or no qualifications, formal job creation is low or of poor quality. Often, many find themselves unemployed, uneducated or untrained (NEETs). This phenomenon is not new; high rates of young NEETs have not changed substantially over the past decade, reaching 29% of 15-24-year-olds in Morocco, 28% in Egypt and 25% in Tunisia (Lopez-Acevedo et al. 2021). The situation remains worrying and requires redoubling efforts to integrate this category into working life. Faced with this context, it seems difficult to dissuade young people from emigrating.

Finally, the paper insists on the need to identify promising trades and economic sectors of potential growth on both shores of the Mediterranean. This should make it possible to identify those that are likely to create work opportunities, especially among young people, and graduates as well as training needs in the short and medium term.

It also stresses that the multiplication of exogenous shocks, the disintegration observed within Europe's own borders (in the North with the Ukraine-Russia conflict and in the South with the Arab revolutions) and the challenges posed by changing migration trends, show, if need be, that partners on both shores have an interest in paving the way for further regional integration.



CHAPTER 1



CHAPTER 1. Partnerships for skills mobility in the institutional and regulatory context of professional mobility between North Africa and Europe

Current cooperation actions on migration

Since 2020, Member States have undertaken a wide range of legislative changes to increase the effectiveness and efficiency of migration management policies. Attracting workers from third countries and strengthening the protection of refugees and asylum seekers remain priorities at national and European level alongside efforts to address the root causes of irregular migration, for example by tackling migrant smuggling.

On the first strand, Home Affairs Commissioner Ylva Johansson said in 2021 that "*Replacing irregular migration with legal pathways should be our strategic objective. We need legal migration: Europe's working-age population is shrinking, and many key sectors are facing skills shortages, such as healthcare and agriculture. Talent partnerships will help match the skills of candidates wishing to work in Europe with the needs of the labour market. Partnerships to attract talent will also give Europe an excellent tool to engage with our partner countries on all aspects of migration, which has been lacking so far.*"⁴

In this context, several initiatives have been proposed such as the revision of the old EU directives, including the EU Blue Card Directive ((EU) 2021/1883, EMN, 2022). This EU-wide admission system aims to attract and retain qualified and highly qualified people, particularly in sectors facing skills shortages. Thus, initiatives on legal migration have been taken such as the "Skills and Talents Package" adopted on 27 April

2022. Partnerships to attract talent are one of the main components of the external dimension of the new Deal on Migration and Asylum. This is a new vision of the Commission's partnerships to address skills shortages in the EU and strengthen cooperation on migration. These partnerships will be open to students, graduates and skilled workers. More interestingly, they "will also offer opportunities for vocational education and training, integration support for returning migrants, improving the way the EU works with the diaspora, and providing expertise and analysis of employment needs". As stated in the Commission's Communication "Attracting skills and talent to the EU", partnerships to attract talent "should transform the risk of brain drain from partner countries into a brain drain for all partners, which will benefit those concerned by having access to new training opportunities, professional experience and further studies or vocational education and training programmes developed in the Union or in their home country."

The first partnerships to attract talent will be launched with North African partners in particular Egypt, Morocco and Tunisia and will be implemented for an effective start at the end of 2022. The new vision of Europe is highlighted by several operational actions. For example, the EU continued to finance several measures to increase the capacity of the competent authorities in these countries to better manage labour migration to Europe (Box 1). In addition, the Commission launched in February 2021 "A renewed partnership with the Southern Neighbourhood" accompanied by an "Economic and Investment Plan for our southern neighbours, an

⁴ https://ec.europa.eu/commission/presscorner/detail/fr/ip_21_2921

important contribution to strengthening cooperation with the countries of the South (Principle of "more for more").

Initiatives developed under the European Southern Neighbourhood Policy include the establishment of a database of ENP-South partner countries. These data are provided by the national statistical institutes of each country concerned and compiled by Eurostat. They cover different thematic areas: Economy and finance, Population and social conditions, Tourism, Agriculture and fisheries, International trade in goods, Transport, Environment and energy.

New trends in labour migration: The potential of SMPs

The need for a renewed focus on skills mobility, as emphasised in the Pact on migration and Asylum, and reiterated since in the Skills Packages and Talent Partnerships communications has also instilled the need for development partners to propose various intervention models. GIZ supports a Triple-Win model⁵, ILO-IOM-UNESCO and IOE proposed a Global Skills Partnership for Migration in 2018⁶. In a March 2022 publication, the OECD and the European Migration Network (EMN) proposed the concept of Skills Mobility Partnerships.⁷ ENABEL supports a Global Skills Partnership model⁸, and more recently, IOM first published on Skills Mobility Partnerships (SMPs) in January 2022⁹ and will develop their approach in a policy brief for publication in 2023. These different partnership models are not entirely new. Regardless of nuances between them and the use of different methodologies, the idea developed here is that migration is a process that can be beneficial to all actors: the migrant, their country of origin and their country of adoption. In this context,

policymakers have increasingly turned to an innovative alternative, namely SMPs, even though EMN and OECD for instance recognise that SMPs, GSPs and Talent Partnerships are fairly interchangeable concepts¹⁰. For

Box 1. Euro-Mediterranean cooperation for statistical capacity building in the framework of the ENP-South programme.

The EU supports bilateral and regional statistical capacity building in the ENP-South region which includes ten Southern Mediterranean countries (Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine, Syria and Tunisia). This takes the form of technical assistance to national statistical institutes in partner countries through targeted programmes such as trainings, working groups and workshops, exchange of good practices and transfer of statistical know-how. The ENP-South programme ensures that policy decisions are based on sound statistical evidence and seeks to strengthen cooperation and coordination between national statistical institutes and regional and international organisations active in the region.

countries of origin, cost-sharing and joint programmes among several stakeholders of the partnership would keep training costs for local workers and future migrants low and better prepare their workforce, for greater integration into international labour markets. These workers, once trained, will join the local or foreign labour market where they will hold jobs, which correspond to their skill level. This scheme is the spirit of SMPs. The latter can particularly foster cooperation agreements in new forms between Europe and certain talent partners in the years to come.

These partnerships also help to tackle youth unemployment, which is one of the sources of illegal migration to Europe, by providing them with vocational training and education to enable them to acquire the necessary skills to integrate more easily into the local labour market.

Currently, there are various EU mobility pilot schemes

⁵ <https://migrationnetwork.un.org/projects/triple-win-programme>

⁶ https://www.ilo.org/skills/pubs/WCMS_653993/lang--en/index.htm

⁷ <https://emnbelgium.be/publication/skills-mobility-partnerships-exploring-innovative-approaches-labour-migration-emn-oecd> ;

<https://www.oecd.org/migration/mig/2022-March-Joint-EMN->

<OECD-Inform-Skills-Mobility-Partnerships.pdf>

⁸ See this conference : <https://emnbelgium.be/news/conference-skills-mobility-partnerships>

⁹

<https://eea.iom.int/sites/g/files/tmzbdl666/files/documents/Skills-Mobility-Partnerships-Infosheet.pdf>

¹⁰ <https://www.oecd.org/migration/mig/2022-March-Joint-EMN-OECD-Inform-Skills-Mobility-Partnerships.pdf>

facilitating labour mobility. These programmes are either part of the Mobility Partnership Facility (MPF), or the EU Trust Fund, or funded under the New Deal on Migration and Asylum, and in future, under the Talent Partnerships. These mobility programmes are aimed at high-, medium- and low-skilled migrant workers (see the example presented in Box 2).

However, in terms of employment opportunities, it is highly skilled migrants who tend to benefit more from current mobility pathways, as highlighted in IOM's August 2022 study that takes stock of skills mobility partnerships between Africa and Europe and short-term pilot projects. This study reveals that, for the time being, these programs are designed to promote labour mobility rather than skills development. This is due, in part, to the nature of current mobility programmes that do not foster structural cooperation between home and host country governments, as well as to the lack of commitment that goes beyond mobility programmes, manifested by insufficient resources that are transferable to countries of origin and less sustainable in the long term. The study also mentions a lack of long- and medium-term vision and planning and limited development in the country of origin. It identifies other challenges to be addressed in the pilot phase: insufficient coordination and cooperation between countries and a need to satisfy a wide range of stakeholders in these countries. In reality, collaboration between different stakeholders within and between countries can be a complex, if not perilous, exercise. Especially in cases involving different interests, expectations and political and bureaucratic processes, but also because of the

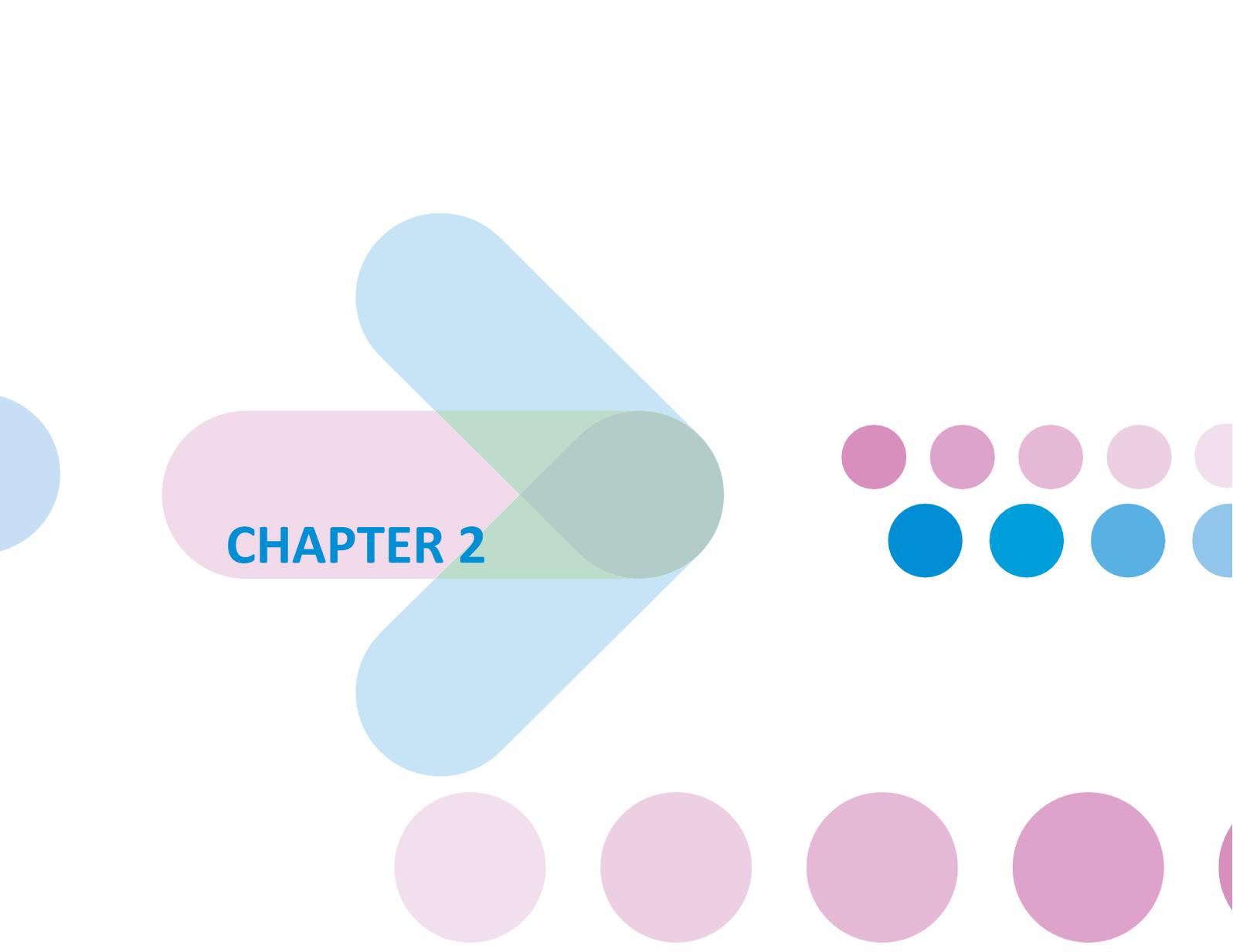
multiplication of stakeholders: governmental institutions, education sectors, trade unions, non-governmental organizations, migrants' associations and private sector actors, such as industry federations or chambers of commerce.

The pilot programmes **to be** launched under the Talent Partnerships place particular emphasis on green and digital professions and skills that are in high demand in all partner countries. The focus on such sectors seems more obvious today than in the past, given the consequences of the Covid pandemic.

In any case, there will be a need to increase the scope of these partnerships and their level of ambition, while placing them within a broader framework of cooperation, to be defined with the respective Member States and partner countries, and mobilising all relevant stakeholders in the process, according to the Commission.

Box 2. Focus on the WAFIRA pilot project that encourages circular migration of Moroccan seasonal workers to Spain.

Co-funded by the European Union through the Migration Partnership Facility (MPF) and the Spanish government, the programme targets Moroccan women who travel to Spain each year for the berry harvest in the Huelva region. Spain is launching its second pilot project in 2022, selecting 250 participants for the 2022-2023 season. One of the advantages of the project is that it increases the personal independence of seasonal workers, since it aims to develop their entrepreneurial potential by receiving training to start their own business upon their return to Morocco. Training courses are organized for them with financial and technical support for their professional project. Initially, only women in the agricultural sector will be part of the pilot project.



CHAPTER 2

CHAPTER 2. General framework for analysis and implications for the management of migration issues in the North African region

Given the high level of youth unemployment in the studied region and the low wages for jobs that often do not match their qualifications, it can be said that economic migration is of strategic importance for these countries. It relieves the strong pressure on local labour markets. This situation seems worrying if one takes into account the strong demographic pressure that the region is experiencing. As a result, the increasingly educated working-age population faces high unemployment rates. Differences exist between countries, but they do not call into question this overall pattern. It is clear that this pressure will continue to be exerted on the labour market (and on the education system) in the coming years, given the weight of the population aged 0 to 14 years, which represents at least 24% of the total population in these countries studied. At the same time, the active population remains stable with very low growth, because of the different forms of dysfunction of the labour market as shown later in the paper. International labour migration thus absorbs some of the unemployed and underemployed in the countries of the region. All this shows, most clearly, the importance of the integration of this population into the national or, failing that, international labour market. The social and political stability of these countries is at stake.

Therefore, it is reasonable to assume that youth unemployment and inactivity are closely associated with the advent of the Arab revolutions. Moreover, what is commonly known as the "Arab Spring" has been associated with an increase in international mobility in the Euro-Mediterranean region. The advent of Covid has also had an effect on the desire for migration to Europe among young people and graduates from North African countries. All this points to an important phenomenon, namely the

failure of the changes hoped for by the "Arab Spring" and, more generally, the lack of economic prospects.

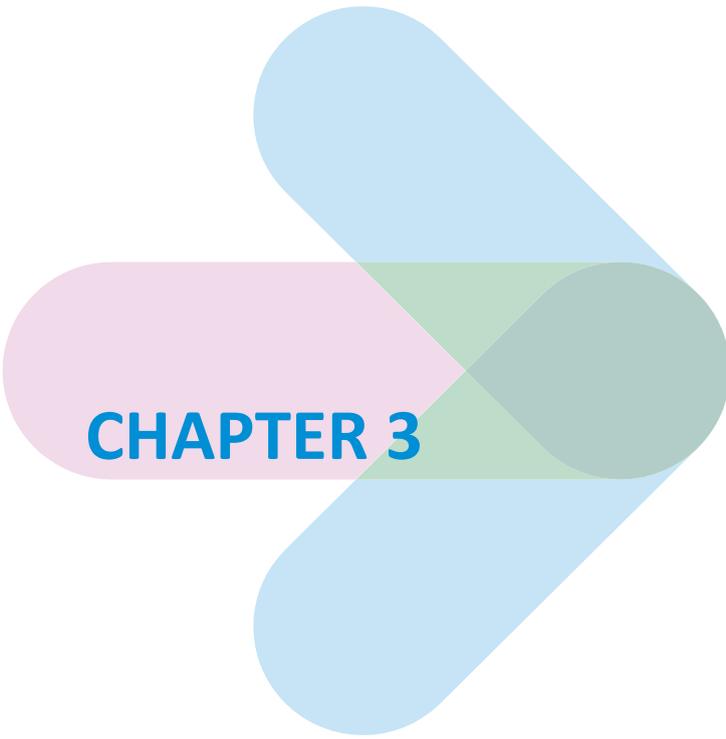
The health context combined with economic difficulties is also pushing governments in the North African region to make strategic decisions to take greater advantage of international employment opportunities, trying to reconcile national labour needs with international labour market requirements. Bilateral, regional and multilateral agreements on labour migration would seek to ensure that countries of origin and destination meet the needs of their labour markets and benefit from the positive effects of migration on societies and economies. They cover, for example, issues of widening channels for regular labour migration (such as agreements on seasonal agricultural migration). In parallel, cooperation projects have been implemented within the framework of programmes that provide an increasing number of students with the opportunity to further their studies abroad or to follow vocational training.

Good migration governance brings other development benefits to migrants' countries of origin, through skills and remittances, foreign direct investment and trade linkages that benefit migrants, their families and their countries of origin. For example, migrants' remittances are one of the key vectors of the impact of emigration in these countries; they are an important source of financing for development for the majority of countries in the North African region. Similarly, investments made through remittances and returned migrants in real estate, businesses, and land are seen as positive effects of migration for countries of origin.

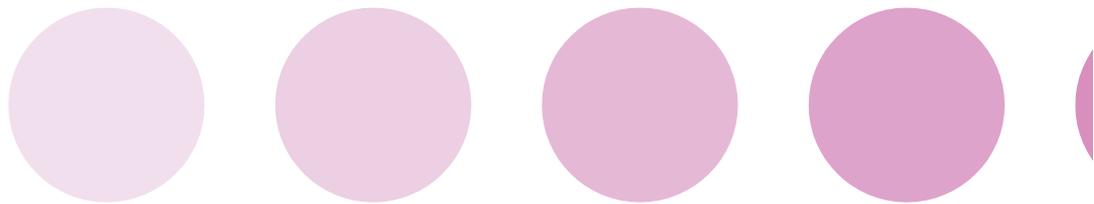
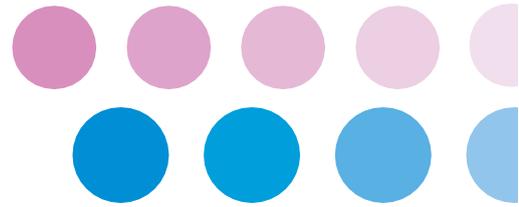
Another consequence of emigration for countries of origin is the deprivation of part of their skilled labour. However, different channels can mitigate its magnitude. For example, thanks to modern information media, young people know that a high level of education in certain specialties facilitates international migration. The level of human capital

in countries of origin increases de facto, before migrants have left their former countries. As a result, human capital increases in countries of origin under the influence of emigration prospects, particularly on personal investment in education. In addition, as UNESCO points out in the case of Africa, "The integration of African diasporas into the global skills market offers them guarantees of maintaining their competitiveness, instead of the sclerosis they suffer if they remain in their country of origin, due to poor working conditions and an environment that is not conducive to professional development. This is particularly true for teacher-researchers, health personnel and, more recently, so-called cutting-edge professions, such as IT, telecoms, finance or biotechnology. »

This does not prevent skilled migration from penalizing the countries of the South, depriving them of one of their scarcest resources, namely human capital. It is for this reason that the debate has shifted in recent years to what is known as "brain circulation". In other words, short-term emigration, allowing migrants to train and work for a few years, before returning to their country. In principle, return migration is thus integrated into the various agreements, but in reality, it has not yet found its place in the management of migration flows in all EU countries.



CHAPTER 3



CHAPTER 3. Labour shortages and labour market tensions in Europe

Given the ageing of the population in Europe, which calls into question the already fragile balance between the working population and pensioners, recourse to labour migration seems quite natural, despite the controversies maintained by the European media. It makes it possible to address labour shortages in several sectors affected by structural shortages, such as accommodation and food services, information technology, health and construction. However, it intervenes in an often non-inclusive labour market with great disparities between and within countries and thus raises the question of the socio-economic integration of immigrants. This issue has important political implications.

Following a faster and stronger than expected post-covid economic recovery, several sectors are offering more job offers than before the pandemic. However, vacancies were already high before the pandemic in virtually all sectors and countries, as shown in Table 1. Recruitment tensions are particularly high in the health and education sectors in all countries in our sample. The weight of the construction, industry, computer and telecommunications sectors, on the other hand, depends on each country.

Moreover, data from national surveys show that geographical disparities in supply and demand exist, which explains a variation in tensions from one territory to another. For example, in France, in the agri-food industry, recruitment difficulties spare some departments in the north, east of France and south (Chartier et al., 2022).

Table 2 shows the main priority occupations with deficits in European countries. These are businesses in high or very high tension in Europe; this is the case for ICT and STEM (science, technology, engineering and mathematics) occupations. A major reason for the shortage of STEM specialists is the insufficient supply of upper secondary and tertiary graduates to meet the increasing demand (Cedefop, 2016).

In Europe, present (and future) skills needs also depend on how labour supply can be mobilised at a given time. In particular, the existence of conditions conducive to the return to work of the inactive, to the high professional and regional mobility, to training for the adequacy of the qualifications of workers already present on the market, and to the improvement of the attractiveness of certain professions, for example. Not to mention that some policies restricting the training of specialists, such as the *numerus clausus* for doctors in France, limit the supply of work in European countries.

At the same time, many low-skilled jobs are not immune to labour shortages in the labour market. In many European countries, immigrants already play an important role in meeting the demand for middle- and low-skilled jobs. In 2020, immigrants were over-represented in certain specific economic occupations (domestic help, caregivers, etc.). Similarly, in European temporary immigration programmes, seasonal workers are the main category with the highest numbers, according to Eurostat data on the first residence permits granted in the EU. For countries that receive a large number of seasonal workers, this form of mobility seems very adapted to certain sectors such as agriculture, given the seasonality of employment.

Table 1. Average number of job vacancies per quarter

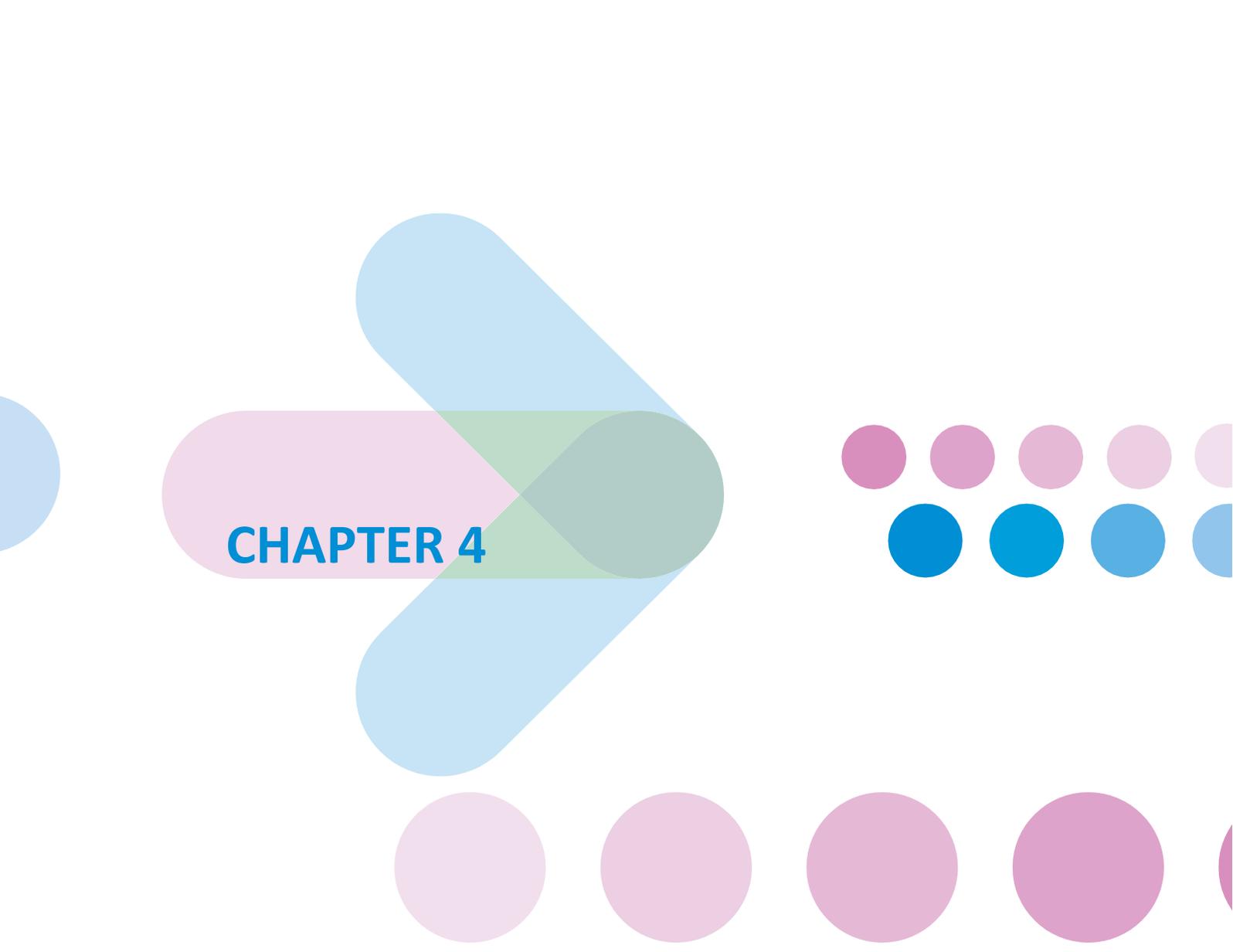
	Year	Health	ICT	Teaching	Construction	Industry (except construction)	Manufacturing	Hotels and restaurants
Belgium	2015	7271	4748	28604	4943	8433	7760	2877
	2018	11300	7871	44820	10861	13644	12383	6417
	2021	14918	10841	53235	13343	17793	15878	8474
Spain	2015	6801	3367	7742	2568	4570	4240	4964
	2018	9729	6936	15055	5310	7381	6780	6039
	2021	11767	6333	15469	6598	7017	6139	4746
Netherlands	2015	15867	10423	24922	5229	12327	11109	10538
	2018	32105	16905	41076	16292	24021	21865	20502
	2021	47475	22750	53925	21875	31650	28675	25825
Germany	2015	124386	38583	257353	72067	99272	94024	80513
	2018	176463	53484	336800	120969	172815	163924	76849
	2021	202159	58097	316350	148413	170521	160345	96371
Switzerland	2015	6546	3647	8663	3057	8502	7992	2692
	2018	8418	4939	11525	5025	14297	13519	4070
	2021	12918	5599	15379	6257	15654	14717	5509
United Kingdom	2015	115250	37750	118500	24750	56750	48750	81750
	2018	131500	47750	131500	25250	69250	60750	91000
	2021*	118000	26333	89000	19000	44000	37333	40666

Note: * Figures refer to 2020

Table 2. The five priority occupations most in deficit, EU-28

ICT Specialists
Except Finland
STEM Specialists
Except Cyprus, Denmark, Estonia, Finland and Greece
Nurses and midwives
Except Spain, Greece, Latvia, Lithuania, Netherlands and Portugal
Teachers
Except Belgium, Spain, Greece, Hungary, Latvia, Lithuania, Luxembourg, Portugal, and United Kingdom
Doctors
Except Greece, the Netherlands, the United Kingdom and Sweden

Source : Cedefop (2016), https://www.cedefop.europa.eu/files/9115_fr.pdf



CHAPTER 4

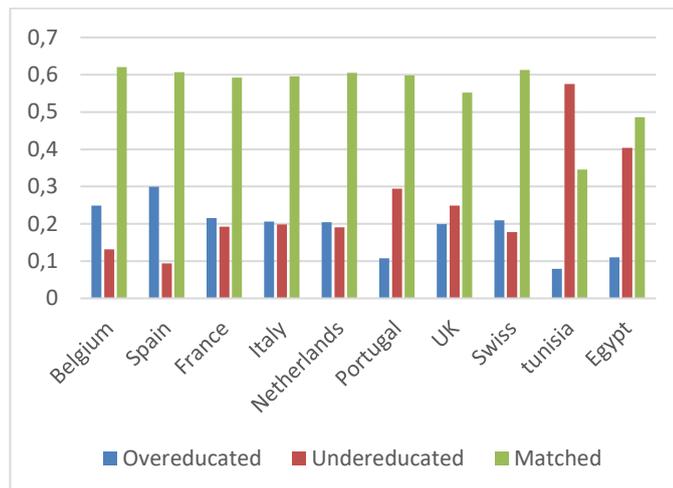
CHAPTER 4. Issues related to competences on both shores of the Mediterranean

The skill levels of the workforce are important determinants of a country's ability to compete in global markets, make effective use of technological advances, and ensure job creation and sustainable prosperity for the future. This applies to countries on both shores of the Mediterranean.

Statistics on the various forms of mismatch between skills supply and demand in Europe provide a better understanding of their impact on labour market outcomes and the structural barriers that foreign workers may face. Employers face shortages of certain rare profiles, exacerbated by the problem of skills mismatches. In this part of the paper, we are interested in these latter forms of inadequacy.

Figure 1 gives us an initial indication of the extent of skills mismatches in the European countries studied here. All these countries (with the exception of the United Kingdom) accounted for 60% of employed persons whose qualifications match the type and level of skills required by their job. But the share of overqualified is high in some of them. Particularly in Spain, among those in employment, around 30% are overqualified, ahead of Belgium (25%) and behind Portugal (10%). However, the gap between the other countries studied remains small at around 20%. In these countries, the mismatch is sometimes due to the fact that workers more easily accept a job that does not correspond to their level of qualification if there is strong competition for recruitment, making them over-qualified workers. In addition, the figure highlights the other type of skills mismatch, namely underqualification, with a high share of the under-educated in Portugal and the United Kingdom (29% and 25% respectively).

Figure 1. Working population according to the various forms of educational inadequacy in the countries studied (Source: ILOSTAT)



Notes: 1) Matched (persons whose highest level of education corresponds to the ISCO educational requirements for their occupation), 2) overeducated (persons whose highest level of education exceeds the International Standard Classification of Education (ISCO) education requirements for their occupation; 3) undereducated (persons whose highest level of education is below the ISCO training requirements for their occupation). For Tunisia, this is 2014 data

On the southern shore of the Mediterranean, all the countries studied here are characterized by the low qualifications of the employed. As Table 3 reveals, in Egypt 61.6% of the active population aged 25 and over have at least secondary education, followed by Tunisia, Algeria, and Morocco with 54%, 41% and 20% respectively. For the youth group (15-24 years), this share increases to 15% for Morocco against 70% in Tunisia, 50% in Egypt and 35.7% in Algeria.

Table 3. Employment by sex, age and education (thousands) (Source: ILO)

Country	Age	Year	Share						
			Total	Below baseline	Baseline	Intermediary	Advanced	Secondary and +	Advanced
Algeria	15-64	2017	10718	729	5624	2488	1878	0,407	0,175
	15-24	2017	1339	22	839	344	134	0,357	0,100
	25+	2017	9518	795	4821	2149	1752	0,410	0,184
Egypt	15-64	2020	25811	5917	4193	9681	6020	0,608	0,233
	15-24	2020	4249	800	1227	1751	470	0,523	0,111
	25+	2020	21949	5412	3007	7949	5579	0,616	0,254
Morocco	15-64	2021	10247	5197	2959	1247	836	0,203	0,082
	15-24	2021	962	295	517	117	32	0,155	0,033
	25+	2021	9810	5380	2474	1136	813	0,199	0,083
Tunisia	15-64	2017	3396	267	1205	1286	636	0,566	0,187
	15-24	2017	362	8	98	228	26	0,703	0,073
	25+	2017	3095	292	1127	1063	611	0,541	0,198

Notes: The classification of apprenticeship at "secondary" level reduces the levels of tertiary education reported by countries where the participation of young people in the apprenticeship system is more widespread

It must be said that countries have adopted economic policies in the past aimed at attracting low value-added activities, which partly explains the high share of workers in low-productivity sectors. In Tunisia, for example, even though the textile industry (which was for a long time the country's largest provider of industrial jobs as well as in Morocco) has lost jobs over the past decade, it remains important for both countries. At the same time, other low-skilled labour-intensive sectors, such as retail and construction, have been job creators (Figure 2). The textile industry has also shown resilience in the face of the Covid crisis in Morocco and Tunisia; However, it has been suffering in recent months from a significant shortage of skilled labour, which is one of the obstacles to its development.

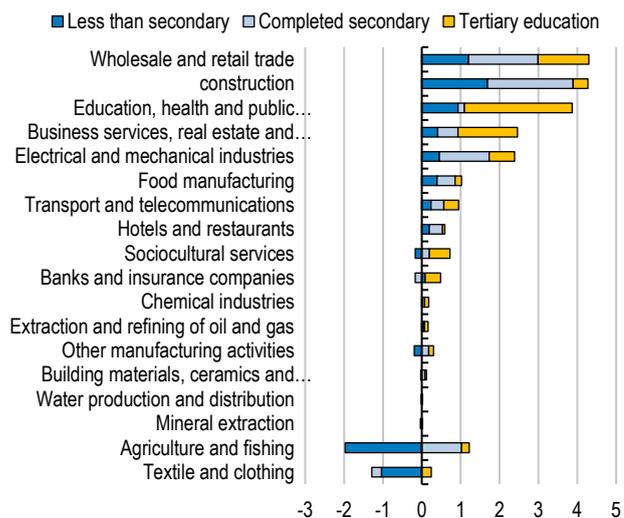
In both countries too, there has recently been a shift towards more skill-intensive and value-added activities, such as outsourced business and ICT services and the manufacture of electrical and IT equipment (OECD, 2022, ILO, 2022). But the unavailability of qualified human resources remains a major challenge for these countries. Figure 2 shows in the case of Tunisia that since 2007, ICT and business services, as well as wholesale and retail

trade, have been among the job-creating activities for many higher education graduates. Thus, although some manufacturing sectors such as mechanical engineering and electrical industries have recruited more tertiary graduates, the fact remains that 52% of jobs in these sectors are held by low-skilled workers, 28% by high-skilled workers, 15% by high-skilled employees and 5.4% by low-skilled employees (OECD, 2022). In other words, many tertiary graduates could be overqualified for these jobs and the absorptive capacity for tertiary graduates in many manufacturing industries is limited (OECD, 2022).

Figure 1 shows a high rate of under-qualification in two countries in the region for which ILO data are available, namely Egypt and Tunisia. This means that 60% of workers do not have the skills required by companies in Tunisia compared to 40% in Egypt. Overqualification affects only about 10% of the workforce in the two countries. If we consider the case of Morocco, the HCP study (2018) analyzes the adequacy of the "highest degree obtained" with the main occupation exercised, declared during the 2014 population census. It shows that 45.7% of employed workers are in a situation of adequacy, 7.6% are in a situation of professional downgrading

and 46.7% in a situation of over-classification. In the three North African countries, the situation of over-ranking suggests a crying need for training to improve the performance of human resources, and make these countries competitive in a sustainable way in global markets.

Figure 2. Contribution to total employment growth by activity and educational attainment, 2007-2019 (in percentage points)



(Source: OECD Economic Survey: Tunisia 2022)

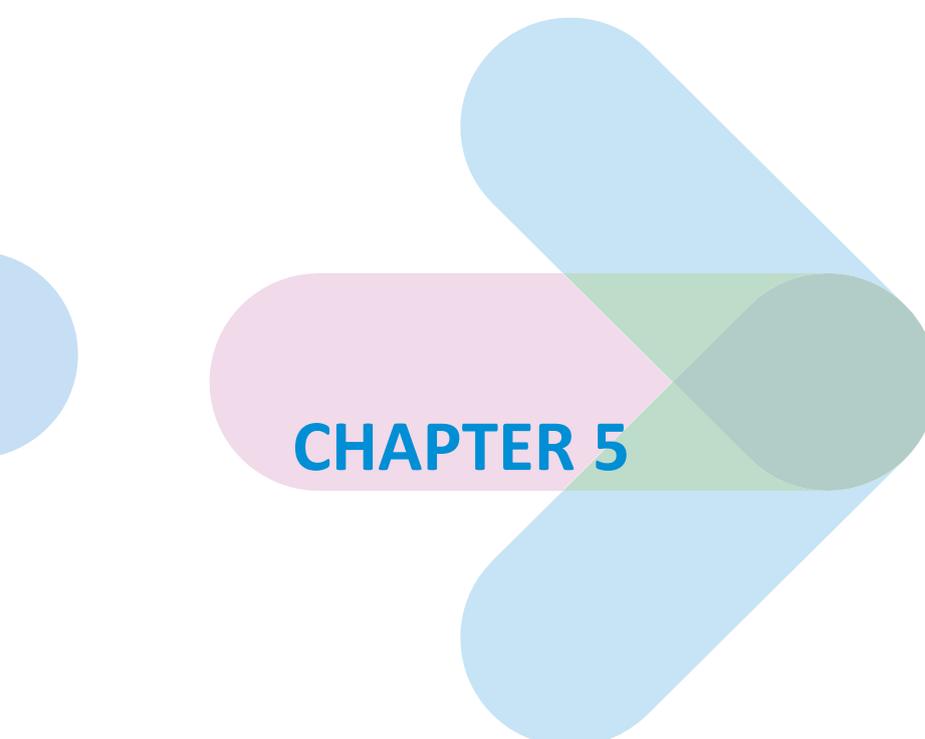
On the other hand, the absorption of downgraded skills requires an improvement in the quality and relevance of skills training. In addition, the necessary reallocation of the labour force (especially the unemployed) to expanding sectors will require substantial investment in the retraining of workers. In addition, statistics show that despite high unemployment, companies are struggling to find a workforce with the skills in demand in Egypt, Morocco and Tunisia (HCP, 2018; OECD, 2022, Box 3).

The OECD study on Tunisia highlights that in addition to technical and professional skills, many candidates lack soft skills such as oral and written communication, foreign languages, teamwork and problem and conflict resolution skills. The HCP survey also shows that 39% of the companies surveyed said they encounter difficulties during their recruitment operations. The main reasons for

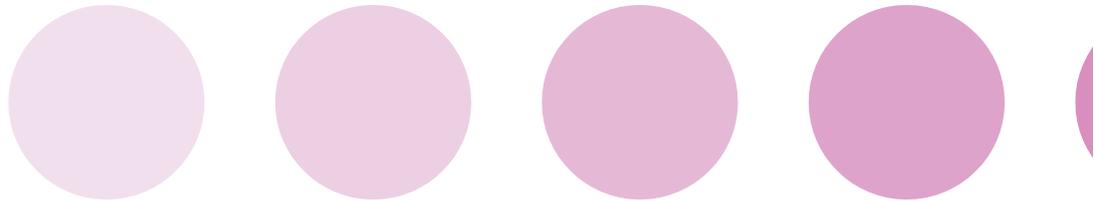
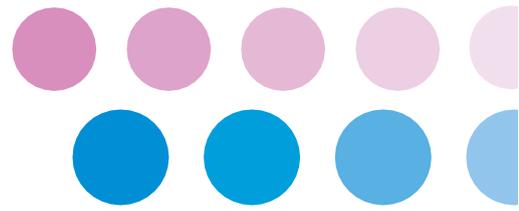
these challenges include: 1) The lack of know-how of candidates, including those with a first experience (37%), 2) The behaviours and soft skills aspects of candidates (23%), 3) The high demand on certain profiles (16%), 4) The inadequacy and or inadequacy of basic training of candidates (14%) (Ministry of Labour and Professional Integration (2021).

Box 3. Example of a programme to promote dual training in Egypt.

Many Egyptian companies are looking for skilled workers because graduates are not sufficiently prepared for employment. The dual training system offers these companies the opportunity to participate in the design of training and to ensure that training meets the requirements of the labour market. The cooperation programme between Egypt and Germany aims to "improve the quality and quantity of work-linked training for skilled workers". This is a German support programme managed by GIZ for the period 2018-2020. It is planned to train 300 teachers and 500 trainers in companies. Training is also provided for school principals and training counsellors. In-company teachers and trainers will participate as trainees in an advanced training module, while teachers will participate in an expert training module.



CHAPTER 5



CHAPTER 5. Indicators for forecasting and analysis of skills needs

The European labour market and future changes linked to the evolution of labour demand

Table 4 shows the future evolution of labour demand over the period 2020-2030 in the EU27 by sector of activity. There are contrasting developments from one sector to another. Thus, the "Agriculture, forestry and fisheries" sector will experience the largest decline (3%), followed by the extractive industries sector (-1.67%). Conversely, the "Hotels & restaurants" and "Health and social services" sectors will experience the highest annual growth rate: +1.07% and +0.97% respectively. Achieving the related hiring levels requires that the vacancies are effectively filled. However, we note that these are the same sectors that are currently affected by structural shortages, such as the IT, health and restaurant and hotel sectors.

The problem of shortages is obviously far from being cyclical. As in any unbalanced market, the first explanations are to be found in supply and demand. On the supply side, the dysfunctions are simply due to the lack of skills in certain sectors, itself due to the strict conditions of access to certain professions. Employment conditions (precarious employment, working hours incompatible with family life, pay conditions) also play a role in these shortages. Intuitively, we immediately think of the hotel and restaurant trades, but not only. There are other professions such as computer engineering, which are highly sought after, given the race to digitization.

The ideal solution to this shortage problem would be to increase the supply of training. If we take the case of the France projections for 2030 show that among teachers, engineers and technical managers in industry as well as computer engineers, young beginners would fill three-quarters of recruitment

needs (France Strategy, 2022). The role of economic immigration seems to be essential in meeting these labour market needs.

In addition, in the health sector, the ageing society is increasing the demand for care services in Europe. Current education systems are not in step with the growing care needs of older populations. In addition, many retirements are expected over the next few years. Under these conditions, shortages are also partly the result of the retirement of older workers and the replacement of generations in highly selective and long-term occupations such as medicine.

The age challenge is particularly strong in Germany, with more than a third of the working-age population aged 50 or over. Therefore, even if employment is expected to increase slightly in the future, it is still true that the majority of job demand will consist of replacements of retiring workers. In contrast, France is expected to perform better in the coming years, with stronger growth in both employment and the working-age population (15-64 years).

Table 4. Future annual employment growth indicator: provides an estimate of the expected annual percentage change in job demand for each country

Sectors	EU27	Spain	Belgium	Germany	France	Italy	Netherlands
Accommodation & food	1,07	0,92	0,04	1,01	1,34	0,93	1,37
Administrative services	0,7	1,69	1,2	0,34	0,39	1,5	-0,63
Agriculture, forestry & fishing	-3,05	2,35	-0,03	0	5,98	4,76	-6,69
Arts & recreation	0,37	0,52	0,38	-0,71	1,23	0,57	-0,58
Construction	0,51	1,82	0,24	0,16	1,14	0,27	0,49
Education	0,63	2	0,09	0,09	0,09	0,16	1,09
Energy supply services	0,65	0,69	0,63	0,9	0,3	0,11	0,74
Finance & insurance	0,12	1,95	-1,13	0,07	0,95	-0,6	0,73
Health & social care	0,97	0,34	2,19	0,83	1,28	0,02	0,55
ICT services	0,86	1,33	1,64	-0,04	1,96	0,64	0,25
Manufacturing	-0,29	0,92	-0,06	0,13	1,91	0,37	-0,3
Mining & quarrying	-1,67	-1,4	0,42	-2,3	0,25	2,45	-3,16
Professional services	0,83	0,41	1,48	0,69	0,99	0,16	0,8
Public sector & defence	0,4	0,94	-0,47	0,09	0,14	-0,2	1,14
Transport & storage	0,52	0,06	-0,46	0,84	0,98	0,4	-0,55
Water and waste treatment	-0,13	0,67	0,59	0,35	1,57	0,15	1,27
Wholesale & retail trade	0,55	1,2	0,54	0,35	0,61	0,64	0,34

Notes: Professional Services : architectural and engineering services, R&D, advertising or market research.

Source : [Future annual employment growth | CEDEFOP \(europa.eu\)](https://www.cedefop.europa.eu/en/what-we-do/employment-growth)

Future demand for jobs in Europe, contrasting situations between countries

By 2030, job creation will be very heterogeneous across sectors and countries. The sectoral analysis at the national level presents the jobs that will be most in demand in each sector of activity (Table 4). For example, growth will be particularly marked in accommodation and food services in Germany and the Netherlands (+1.01% and +1.37% respectively). In the countries studied, the highest annual employment growth over the period 2020-2030 will be in the ICT sector in France (1.97%), health in Belgium (2.19%) and education in Spain (2%), followed by Finance & Insurance and Construction

with 1.95% and 1.82% respectively. The administrative services sector will come out on top in Italy (1.5%). On the other hand, the agricultural sector and occupations related to this sector will be the most affected by the decline in employment in the coming years. The sector will experience a more marked decline in France and the Netherlands (around 6%).

In Belgium, Spain, Italy and the Netherlands, almost half of job vacancies, including job vacancies until 2030, will require a high level of qualification. But Spain and Italy will continue to offer many job opportunities for low-skilled or middle-skilled people. Similarly, in France, although highly skilled occupations, such as researchers and engineers or legal and social professionals, will expand

throughout the decade, the profession that will see more job creation will be cleaners and helpers, followed by sales workers. In Germany, the most in-demand jobs will require mid-level skills such as legal & social associate professionals and customer clerks.

Big Data, 5G and artificial intelligence will serve as catalysts for several other future trends and innovations. Technological innovations, technical progress and the fight against planned obsolescence (following the consideration of environmental considerations) mean that the skills specific to the IT and digital sector are rapidly deteriorating. Hence the urgent need for Europe to develop and improve vocational training and to strengthen the initial training system.

In addition, current and future labour market trends show that some middle-skilled or manual jobs will be eliminated as a result of technological advances, for example through automation in sectors such as manufacturing and logistics. Conversely, despite these advances, the demand for certain industrial functions that cannot be relocated, such as equipment maintenance or quality control, will be maintained or even strengthened.

Future demand for labour in selected sectors in North Africa rises

The ILO study (2022) on trends for Morocco in the outsourcing market at the global level, and particularly at the European level, has identified some promising sectors. It highlights how certain sectors related to the offshore sector could have positive effects on export growth and employment in the coming years. It suggests that job creation could total 50,000 jobs in the offshore IT (ITO) branch. It should be noted here that Morocco's sectoral strategies since the global economic crisis of 2008 aimed in particular to advance the country's strategic autonomy to ensure its food security and promote its energy independence, but also to strengthen its positioning in what will be described

as "Morocco's global professions", in particular, in the automotive and aeronautical industries. The sectors targeted from the outset are in particular industry, agriculture and fisheries, tourism, renewable energies, offshoring and logistics.

Studies of other countries in the region are more limited, but they highlight the preponderance of the offshore sector. The OECD study (2022), conducted in Tunisia, shows that the number of formal jobs in IT services increased from 2,400 in 2007 to 24,000 in 2019. But the vast majority of these jobs (78%) were created in fully exporting companies (so-called "offshore"). The latter export mainly to the European market and benefit from preferential conditions in terms of taxation, customs duties, administrative procedures and access to customs and trade infrastructures. For Egypt, between 2010 and 2015, employment in modern sectors such as IT recorded negative or marginal variations (IOM-CAPMAS, 2017).

Other sectors play an important role in ensuring the employability of the next generation. This is the case of the textile sector in Tunisia and Morocco. One of the direct consequences of the disruption of the supply chain during the Covid-19 crisis, following the closure of borders and the subsequent excessive increase in international transport costs, was the choice of many companies in the sector to produce close to the European market. This relocation of industrial production sites may generate additional costs, but they are not comparable to the immeasurable additional costs in the event of a major crisis, such as that caused by the Covid pandemic. This movement to relocate activities to North African countries is an unexpected opportunity for these countries, particularly in the context of a rise in rhetoric in favor of the decarbonization of the global economy. The upcoming entry into force of the European carbon border tax would encourage more industrial relocations in the region.

The countries of North Africa, and Morocco in the first place, are trying to position themselves in what

are called "global professions", in particular, in the automotive and aeronautical industries, the development of mobile applications, the Internet of Things (industrial), the development of cybersecurity, blockchain etc., with mixed results. If Morocco has been able to do well, especially in the field of automobiles and to a lesser extent aeronautics, this is not the case for other countries. It must be said that these professions require a significant educational effort, especially in the training of engineers. It is clear that the intentions are good, but in reality the road ahead remains long. This engineering sector can be a point of friction between European and North African partners.

Global demand far exceeds supply at this level. Another sector worth studying is the health professions. It has long been known that some North African countries are lagging far behind in the training of doctors and nurses, but the advent of the Covid pandemic has shown that the problem is more prominent. As discussed above, a number of European countries also have significant needs for health personnel and therefore foreign labour at least in the short term. Here too, this is a stumbling block that must be admitted to try and provide smart solutions.



CONCLUSIONS AND PERSPECTIVES

CONCLUSIONS AND PERSPECTIVES

We are faced with two distinct blocs, even if areas of commonality exist, in particular those relating to the dysfunctions of the labour market (all things considered). The first dysfunction is that of European countries, the main feature of which is the shortage of labour in a number of sectors. The second is that of the countries of the Southern Mediterranean. In addition to endemic unemployment and the pervasiveness of the informal sector, their economies are based on the employment of a low-skilled workforce dominated by social groups with no or very limited levels of training. In other words, the current structure of the economies of the South region does not allow for massive recruitment of young graduates. This can be an interesting opportunity for the European market. Also, the prospective study indicates that in Europe, certain sectors should remain in tension at the recruitment level throughout the decade 2020-2030. However, this often concerns occupations for which tensions can already be observed today in the majority of the countries studied.

In this context, the new legal migration scheme – the Talent Partnerships – could be beneficial to both Mediterranean partners. This should be done by making better use of existing mobility partnerships and building on lessons learned from the pilot initiatives launched to date. Where appropriate, there will be a need to strengthen capacities to implement, monitor and evaluate progress towards the objectives of mobility programmes. The introduction of reviews to give priority to programmes with the highest economic and social impact could be strengthened in this regard.

In terms of migration policy, strategic orientations have been observed in the southern Mediterranean. The development of international employment mediation is the most outstanding instrument of this policy in some countries of the

region; It is envisaged to implement a migration policy determined in part by demand. The report advocates synergies between migration and employment policies to successfully reconcile national needs with the requirements of the external labour market. A policy mix including enhanced job creation, mediation at national and international levels, and training, as well as anticipation of skills and employment opportunities. The latter enables young people, policy makers and workers to make informed choices about education and training.

The importance of reliable statistical systems describing employers' needs and skill levels in an evolving manner should be noted here. This is a sine qua non for sound planning of human resources development policies.

There are several opportunities to change national migration policies. First, by updating the list of occupations in tension much more often (in France for example) and by having more realistic entry quotas (in Italy for example) to better meet the needs of employers in the short term. It is therefore important to plan for substantial investments in integration, social services and housing for newcomers. Secondly, to improve the monitoring of the trajectories of the immigrant population, which would make it possible to better monitor the evolution of their professional integration over time. In addition, by committing to the issue of regularization and opening the way to the possibility for an illegal worker to apply for regularization himself, because some employers seek to keep him underground with low pay, and often deplorable working conditions. Finally, by considering the possibility of allowing asylum seekers to work during their first months in the European country. Although challenging, the integration of refugees as well as irregular migrants should be seen as an opportunity.

These pragmatic solutions may seem complicated

to implement, and require firm political will. However, they pale in comparison to the possible reluctance of the countries of the South if they do not feel involved in the programs driven by the North. We really want to insist on this point, because it seems fundamental to us. The involvement of the authorities of the South in the conceptualization, implementation and evaluation of these programs from the beginning of the process is an important step in creating a climate of trust. This was our conviction from the beginning of this research, but it was confirmed by the interviews we had with our various interlocutors. Similarly, the sums allocated to these programmes, in which the highest European authorities firmly believe, must

match the ambitions. The pilot programs (THAMM, SMP among others) have proven their worth, it is time to take action and roll them out on a large scale.

The Cairo conference is crucial. Not only will it make it possible to take stock of the various actions undertaken on both sides, but also to preserve the chances of a civilization in co-production, where the partners are considered equally. It is also an opportunity to write a part of a common history, the accomplishment of a great design where mutual recognition between partners will no longer be a vain word, but a real commitment.



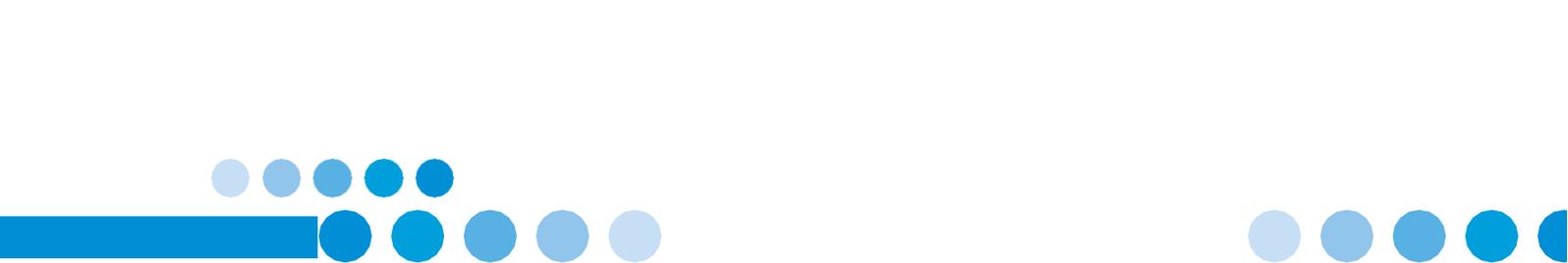
RECOMMENDATIONS

RECOMMENDATIONS (under development)

- **Recommendation 1.** Accelerate the recognition of diplomas and skills obtained abroad and coordinate the actions of European states to facilitate labour migration, while diversifying the origin of migrants and targeting countries of origin that have a surplus of good graduates.
- **Recommendation 2.** Use the diaspora option to encourage return migration by valuing the experience and know-how of the returning immigrant. Coordination with the countries of origin seems essential for the success of this option.
- **Recommendation 3.** Introduce a transparent and evolving system for selecting candidates for immigration, based on criteria related to the future candidate's ability to integrate easily into the labour market.
- **Recommendation 4.** Good practices that have proved successful in the field of seasonal migration, particularly in agriculture (supervised mobility, extension of the duration of the visa, multi-season residence permits, support and training of seasonal workers) can be extended to other sectors (hotels and restaurants for example).
- **Recommendation 5.** Facilitate the granting of a residence permit at the end of their studies to North African students, in particular to highly qualified students, without obligations related to the minimum wage or the match between employment and qualifications.
- **Recommendation 6.** To solve the recurring problem of connecting European employees with foreign talent, have a Europe-wide digital platform.
- **Recommendation 7.** Improve the scope and level of ambition of current pre-employment

or pre-employment migration training programmes designed within the framework of partnerships for skills mobility (language training, legal and administrative provisions regulating them, etc.).

- **Recommendation 8.** Skills mobility partnerships are a major step towards establishing cooperation agreements in new forms, between Europe and certain partners to attract talent. However, to succeed in these initiatives, human and financial resources should be provided and countries of origin should be more involved in their conceptualization and implementation.



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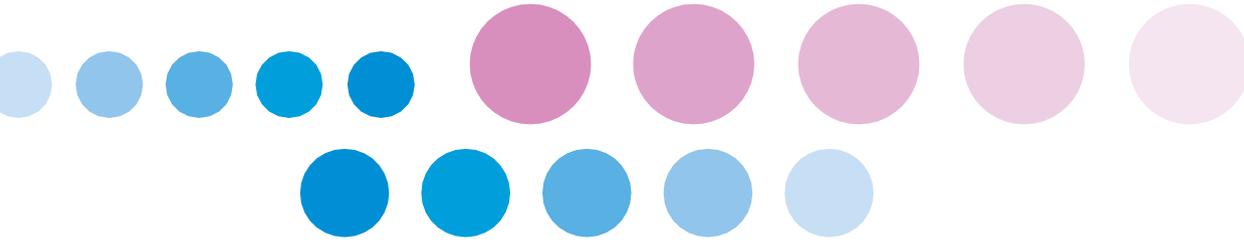
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THIS PROGRAMME IS FUNDED BY THE EUROPEAN UNION AND CO-FUNDED BY THE GERMAN FEDERAL MINISTRY FOR ECONOMIC COOPERATION AND DEVELOPMENT



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