

FUTURE MIGRATION  
SCENARIOS FOR EUROPE

Report

# DELPHI STUDY

## Future Migration Scenarios for Europe



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Report

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## Key findings

A two-round Delphi survey amongst experts on migration policies was carried out. The experts made predictions about key migration drivers; composition of migration by gender, level of skills, and regions of origin and destination; as well as future migration policy trends that are likely to be pursued in the EU in the next 10 years (until 2030).

- Key drivers selected by the experts were 1) wage differences between origin and destination regions, 2) political stability and conflicts, and 3) potential supply of skilled job opportunities.
  - For skilled migration, the Eastern EU, Southern EU, non-EU Eastern Europe (including the Balkans) and Asia are predicted as key sending regions. Northern EU and Western EU will be the most likely destination regions (and Southern EU for those originating from outside the EU).
  - For low-skilled migration, the Eastern EU and Southern EU are predicted for intra-EU migration as likely regions of origin. Low-skilled migrants will move from non-EU Eastern Europe and the Balkans, Sub-Saharan Africa, Asia, and the Middle East and North Africa.
  - The Western EU is the most likely destination for low-skilled migrants from within the EU; while both the Western and Southern EU will be equally important for migrants from outside the EU.
  - A majority of experts predict that the difference in proportions of male and female migrants (54% to 46% in 2009-18) may narrow in the next 10 years.
  - Experts suggest that policymakers should prioritise low labour force participation and heavy caring responsibilities of female migrants as key issues related to gender.
  - On likely policy trends, experts predict that policymakers will seek to prioritise control and return policies, supporting visas for highly skilled graduates, and promoting intra-EU mobility.
  - Experts expect more 'progressive' policies, e.g., gender-specific and family-friendly integration policies, to be of lesser importance.
  - Experts predict that a slow economic recovery, similar to pre-pandemic growth levels will follow the COVID-19 pandemic.
  - Experts expect pandemic will lead to more restrictive migration policies, perhaps selective towards skilled migrants, or will not have much of an impact on specific migration policies.
  - Experts predict an acceleration of processes already taking place such as changing work practices and increasing inequalities within societies and between countries.
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# 1. Introduction

This report describes the methodology, implementation and results of a two-round Delphi survey looking at predictions made by a panel of experts focusing on migration-related: drivers, composition and policies for the EU in the next 10 years. The survey has been carried out amongst experts with experience in policymaking or advising policymakers in the area of migration. This report documents responses collected in both rounds of the survey. The first round was carried out in March 2021, whereas the second round was collected in June-August 2021. This work constitutes Task 3.2 in Work Package (WP) 3 of the Future Migration Scenarios for Europe (FUME).

The FUME project aims to determine both current and future trends of migration by, firstly, looking at the major factors that can explain migrant movement patterns. This is achieved by analysing regional and local circumstances that either attract immigrants or force them to relocate to other countries. Secondly, the migration trends are investigated by assessing possible future regional sociodemographic, economic and environmental challenges that may shape future migrant movement patterns in Europe. FUME also supports planning and policy-making processes at many levels by formulating integrated and coherent visions of how migration to and within Europe might evolve under different scenarios relating to potential demographic, socio-economic, political, and environmental challenges.

The aim of WP3 is to develop what are called *narratives*, that is, qualitative descriptions of future changes in demographics, the economy, the environment, political circumstances, and policies at global, national and regional levels (cf. O'Neill et al. 2017; De Jong and Boissonneault 2021; WP 3.4). These narratives will further be utilised in the FUME project to formulate quantitative migration scenarios and population projections (WP4).

The FUME Delphi survey contributes to the activities of WP3 by providing a deeper understanding of these drivers, key-specificities and intensities surrounding international migration towards the countries and regions of the EU. Specifically, the FUME Delphi firstly elicited opinions from the experts on key drivers of migration; followed by examining expected characteristics of migration flows, specifically looking at migration composition by educational attainment (skilled vs low-skilled) and gender. Origins and destinations of both skilled and low-skilled migrants were also examined, for migration flows both intra-EU and from regions outside into the EU, for the next 10 years. The characteristics (gender and skill level) of migrants have been a focal point of migration debates amongst various stakeholders. Following this, in the second part of the Delphi survey, we asked experts about what they believe policymakers will seek to prioritise in relation to future migration policy strategies, again focusing on gender and educational characteristics. The predictions made by the experts can provide meaningful information in understanding future migration flows and help establish migration scenarios for further use in the FUME project.

This report fits within the other WPs of the FUME project. As mentioned above, the elicited expert opinion will subsequently be used as input for the creation of migration narratives (WP 3.4), which, in turn, will be used to produce migration scenarios developed by using migration models (WP 4.1 and WP 4.2) and population projection models in WP 4.3. An alternative approach can see using the FUME Delphi survey outputs to inform the interpretation of the results of the FUME migration model (WP 4.1 and 4.2) in terms of identifying migration scenarios that are likely to achieve the objectives of policies expected to prevail in the EU in the next 10 years. The information elicited on migration composition is related to three above-mentioned characteristics of migration flows: geographical distribution, skills and gender. This information will be used to construct scenarios that depict various future compositions of migration given different policy regimes. Finally, the survey also contained a module on the effects of the COVID-19 pandemic on migration and economic impacts. These will be subsequently fed into the migration model to create medium-term (10 years ahead) migration projections (WP 4.2) and assess the narrative related to the COVID-19 aftermath.





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## 2. Literature review

In this section, we provide a short review of literature on the Delphi method and its use in migration studies and migration prediction. We also cover the main topics that form the FUME Delphi survey, that is, educational attainment and skilled migration, composition of migration by gender, and recent migration policies in the EU.

### 2.1 Delphi method and migration studies

#### 2.1.1 Delphi method

Migration estimation and forecasting often relies on existing data and expert information. Quantitative data on migration, especially flows, are often inadequate, incomparable, or entirely missing (Willekens et al. 2016). Information elicited from experts can be used on its own to produce forecasts of population components, including migration, or it can be used in combination with quantitative data (see, e.g., Bijak and Wiśniowski 2010; Raymer et al. 2013; Wiśniowski et al. 2014). Delphi survey as a means to elicit expert information has gained some popularity in migration studies. A review of applications can be found in Bijak and Wiśniowski (2010) and in Acostamadiedo et al. (2020). In general, Delphi surveys have been used to:

- (1) establish scenarios and/or narratives about migration patterns,
- (2) provide information that aided forecasts of migration, and
- (3) recommend migration policies.

A Delphi survey is particularly useful to provide information that is not available in quantitative data sources. Delphi surveys were initially introduced by the RAND Corporation in the 1950s (Dalkey 1969). Dalkey (1969) defines the Delphi method as 'a method of eliciting and refining group judgements'. The Delphi method has three features: the respondents are anonymous, the survey is iterative and, in each iteration, controlled feedback is provided, and responses are aggregated. It helps reduce bias due to an individual's dominance and achieve convergence of opinion. The Delphi method can be useful for producing a range of quantitative outputs in terms of point predictions, such as group median, as well as variability of the responses (e.g. quartiles). Weights to expert opinions can also be used based on, for example, the amount of change in the second and following rounds, or individual ratings of competence.

The Delphi method was also designed as a tool to help experts to forecast better, through obtaining knowledge from interacting groups (Rowe and Wright, 2001). Its design can be diverse according to the purpose of the study. This can involve varying numbers of experts with heterogeneous backgrounds, typically between 10 and 30 individuals. However, these can be smaller or much larger (see, e.g., Acostamadiedo et al. 2020). Another key feature is the gathering of both qualitative and quantitative data from respondents; the former is a particularly important feature in early rounds where encouraging justification of answers can be vital for purposes such as facilitating open discussion. It also helps provide information such as helping other experts and the researchers understand differing viewpoints, and inclusion of key information in the further rounds that might have been omitted in the first round. Often, a maximum of three rounds (classically, a first unstructured round and two subsequent structured rounds) is recommended (ibid.).

O'Hagan et al. (2006) further characterised the Delphi method as a group communication structure that is useful for facilitating group discussion. It involves an anonymous process of feedback including modifications of earlier responses, in which experts are asked to consider a change in their previous reply, and averaging

results to define a group position. In principle, the procedure can be continued until stability prevails. However, this was not the goal in the study presented in this report. Instead, in Round 2, the experts were provided with aggregated summaries based on Round 1 answers and had an opportunity to reconsider their own opinions and those of other experts about future migration. Rowe and Wright (1999) pointed out that proper feedback from preceding rounds could often improve the accuracy of the forecasts.

### 2.1.2 Delphi survey in migration studies

Delphi surveys have seen extensive use by researchers in studies of migration and for a variety of aims. For example, Lachmanová & Drbohlav (2004) conducted two rounds of Delphi surveys to elicit expert opinions on scenarios of migration between Eastern and Western Europe, quantification of migration, and advisable policies. This study provided expert opinions on relatively narrow topics related to European East-West migration. They invited broad experts from the government, NGOs, local authorities and academic community. Among initially selected 64 potential contacts, 15 responded to the questionnaire. However, the information elicited from the experts was not used in migration forecasting. The authors (*ibid.*) stressed that the key challenges of the Delphi method were the selection of respondents and the structure of the questionnaire.

Delphi surveys have also been used to elicit information that supplemented quantitative data on migration in statistical models. For example, Wiśniowski and Bijak (2009) and Bijak and Wiśniowski (2010) extracted prior information from expert opinions on immigration into selected European countries based on a two-round survey. They explored topics such as trend shapes of future immigration flows, the probabilities of migration being a stable vs highly volatile process, the variability of a future migration time series, and the certainty with which experts provided their answers (*ibid.*). Furthermore, the questionnaire asked about economic and demographic variables that potentially influence migration decisions with a scale between 0 and 10 (Wiśniowski and Bijak, 2009). This information was subsequently used in Bayesian time series models to forecast international migration flows for seven European countries. Recently, Sohst et al. (2020) assessed the accuracy and quality of those forecasts and provided a thorough literature review on the use of expert opinion in migration forecasting.

In another study that aimed at forecasting migration, Abel et al. (2013) employed the Delphi method that aimed at seeking expert views on the definitions of 'environmental migration', and quantifying its future magnitude for the UK. This version of the Delphi survey relied on experts face-to-face interaction in the second round. This provided an opportunity for an in-depth discussion and exchange of opinions amongst experts in demography, migration, and in environmental sciences, as well as representatives from the UK government departments and intergovernmental organisations (*idem.*). Nevertheless, the opinions of the experts varied considerably. The information elicited from the experts related to the share and uncertainty about environmental migration, and was then used together with the available migration data to forecast environmental immigration to the UK.

Further, Wiśniowski et al. (2014) utilised a questionnaire based on Scottish independence scenarios – the status quo and independence – and asked three questions on: 1) the subjective probability of gaining independence, 2) in-migration from the rest of the UK to Scotland, and 3) outmigration from Scotland to the rest of the UK. The two latter questions sought to understand both the potential trends of migration that could arise as well as future levels of migration. As in Abel et al. (2013), Wiśniowski et al. (2014), used the Delphi survey outputs to forecast migration into and from Scotland, under scenarios of status quo and independence. This study highlighted the importance of visualisation of the elicited quantities (i.e. probabilities and uncertainty).

Expert opinions were also used to help overcome inconsistencies in existing migration data that underlie migration forecasts. Wiśniowski et al. (2013) used a Delphi survey in the Integrated Modelling of European Migration (IMEM) project, which integrated migration data and expert opinion in a statistical model that harmonised migration statistics to a common definition of a migrant (Raymer et al. 2013). Wiśniowski et al. (2013) asked experts to provide information on three aspects of migration measurement: 1) the lowest and highest percentages on the undercount of migration (both immigration and emigration) from the published data; 2) opinions on how duration of stay used in definitions of migration affects the size of migration; and 3) the accuracy of migration measurement by various data collection methods, such as registers and surveys (ibid.). When drawing conclusions, the authors pointed out to difficulties in reaching a consensus by experts but also recognised the necessity of accounting for the heterogeneity of expert opinions. Also, overly confident experts coming from similar background could lead to artificial reductions of uncertainty.

Some studies blend expert opinion with scenarios for migration. Sander, Abel & Riosmena (2013) brought together experts in social, economic, and environmental migration. Expert views were obtained through a structured online survey and an expert group meeting (which is a diversion from the original Delphi method and follows Abel et al. 2013 approach) on thematic areas including economic, demographic, climatic, policy and costs impacts on migration. Although the results differed amongst regions, business cycle phases, foreign direct investment, youth bulge, education differentials and family reunification were pointed out as strong drivers of migration as per expert views. Based on those opinions, two scenarios – the 'Rise of the East' scenario and the 'Intensifying Global Competition' scenario – were developed. The former was grounded on the assumption that the traditional migrant-receiving countries will experience economic recession. The latter focused on global competition for skilled labour and natural resources.

Recently, Acostamadiedo et al. (2020) carried out a Delphi survey amongst 178 experts to elicit information on the volumes and uncertainty of various types of migration to the European Union until 2030, and under four different scenarios<sup>1</sup>. However, despite a large number of experts involved in the study, the answers they provided were marked by very high uncertainty and it was virtually impossible to assess what the four scenarios implied for the volumes and composition of future migration. The study also showed that experts disagreed on how various drivers might shape and affect future migration flows. Thus, the authors suggested that the results of the Delphi survey should be used as a nuanced understanding of migration because of disagreement between experts and uncertainty caused by individual bias. They also proposed that the Delphi survey may be more useful when policymakers are directly engaged in developing migration narratives and scenarios and are involved in discussions with migration experts.

In summary, the Delphi method applied in migration studies has been used to create migration scenarios, supplement data in preparing migration forecasts, and to elicit information on the volumes of future migration. As shown in the literature, expert views can help inform the uncertainty concerning future migration levels, patterns and composition. The main limitations pointed out in previous studies included the difficulty in selecting experts and preparation of an unambiguous set of questions (Wiśniowski et al. 2013). Further, a common feature of the expert opinions, especially on the quantitative aspects of migration (e.g. future levels in Acostamadiedo et al. 2020; Abel et al. 2013), was large uncertainty and lack of convergence amongst a heterogeneous set of experts. It is worth stressing that the lack of convergence appeared in the second-round results, where aggregated opinion from the first round was presented to experts, who had an option of changing their opinion.

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<sup>1</sup> The scenarios were: 1) Unilateralism and shifting wealth, 2) multilateralism and inclusive economic growth, 3) unilateralism, crisis and inequality, and 4) economic inequality, crisis and multilateralism.

## 2.2 Education, gender and migration policies

As mentioned in Section 1, one of the goals of the FUME project and WP3 is to develop migration narratives that provide insights into the different migration patterns for groups of low- and highly-skilled persons in the EU, as well as their gender composition. We pursued this information in our Delphi survey by eliciting information on the future composition of low- and high-skilled migration, the prospective gap between male and female migrants, and the potential changes in gender-oriented migration policies. In this section, we look at other Delphi surveys that aimed at eliciting information in those two domains, with a focus on migration-related studies.

### 2.2.1 Skills and education

There are no official statistics capturing international migration flows by education, or skills. The Database on Immigrants in OECD Countries (DIOC)<sup>2</sup> provides such disaggregation for the stocks of migrants, estimated for 2015/16. However, the estimates of total stocks of foreign-born population do not match those reported in the official Eurostat statistics<sup>3</sup>. According to the DIOC estimates, 30% of migrant stocks in the EU (27 countries, excl. United Kingdom) had low levels of education (i.e., up to lower secondary education, as defined by the International Standard Classification of Education, UNESCO 2006). Around 41% of migrants had medium educational attainment (upper secondary or higher non-tertiary education), with another 29% having at least a bachelor's degree (cf. D'Aiglepiere et al. 2019). Due to a lack of data on migration flows by educational attainment, typically expert opinions are used to supplement estimates and projections.

In past Delphi studies, experts suggested that the high educational attainment is a significant factor in increasing emigration, especially from Africa and East Asia (Sander, Abel & Riosmena, 2013). For example, in their structured survey and face-to-face expert group meeting, experts agreed that 'more highly educated people will be more likely to migrate' (ibid., p.55). The experts also suggested that labour and skill shortages in developed countries are the key determinants of migration (i.e., 'temporary labour migration will increasingly compensate for skills shortages in developed countries and thus replace permanent migration.'). These opinions eventually shaped the migration scenarios constructed as an outcome of the study (see Section 2.1.2).

In the study described in Section 2.1.2, Acostamadiedo et al. (2020) asked experts for their opinions on the size of labour immigration in 2030, disaggregated into high-skilled immigration, asylum applications, and irregular border crossings under four possible scenarios. Each narrative scenario was expected to lead to different sizes of international immigration flows in each group. As mentioned in the previous section, interestingly, experts predicted that levels of highly skilled migration could potentially increase by up to four times by 2030, compared to that of the period of 2009-2018. These predictions were characterised by high uncertainty, though.

Jandl, Hollomey, and Stepien (2007) used a Delphi survey to elicit expert opinions and to define the term *Irregular Migrant Work* (IMW) in Austria. The study involved 37 experts in the first round and 22 experts in the second round, who were selected from diverse backgrounds. The experts were asked about the educational level of the irregular migrant workers (such as low, middle, or higher) and also the nature of their work (skilled or unskilled). In their study, the use of the Delphi method is especially valuable because it deals with the topic about which only very little information is available. According to the survey, the experts suggested that there is a mismatch between immigrants' educational level and the skill needs in their work, that they called "de-qualification effect" (Jandl et al. 2007, p.7).

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<sup>2</sup> Available at <https://www.oecd.org/els/mig/dioc.htm> (accessed 24/09/2021).

<sup>3</sup> Available in table migr\_pop3ctb in the Eurostat database, <https://ec.europa.eu/eurostat/data/database/> (accessed 24/09/2021).

Drbohlav et al. (2014) used the Delphi method in the study of migration patterns in Visegrád and Eastern European countries. It was used to address a lack of adequate data and ultimately help build up future scenarios. The questionnaire included quantification of migration flows, migrants' economic performance, future trends, and migration policy of the respective respondent's countries. A large number of experts (120 migration experts) participated in the two-round survey. In the first round, experts were asked their opinions on whether they recommend policy to extend the education system to international students in the EU countries for mutual benefit through migration and integration. In the second round, desirability and feasibility of such policies were evaluated. The survey results suggested that, according to the experts, opening up the educational system for international students is one of the most desirable policies for Visegrád countries as well as a readily feasible approach for the EU Member States.

Lutz and Skirbekk (2013) used the Delphi method to elicit expert opinions on fertility, mortality, and migration. They did so by using an argument-based framework, in which specific arguments about the major forces driving a given population component were assessed by experts in terms of their correctness, then aggregated. Even though the main focus of the study was placed on education as a driver of fertility and mortality, they also included a broad question about the effect of demographic factors (arguments) on migration, including economic, demographic, environmental, and those related to migration regimes and policies. The study highlighted the need for systematic analysis of expert opinions used as inputs to national and supra-national migration and population projections.

### 2.2.2 Migration by gender

Gender-related themes in the literature on international migration include marital status and care responsibilities (De Jong 2000), marriage-related migration (Van Dalen 2005; Sander, Abel & Riosmena 2013), as well as educational attainment and enrolment of males and females (Williams 2009). Social institutions (gender equality, childcare services) have become significant motivations for migration decisions (Bailey and Mulder 2017). Further, female immigrants are less likely to participate in the labour force than native-born women or male immigrants in Europe (Lutz et al. 2019). For example, 54% of women born outside the EU were employed in 2017, compared with 73% of men born outside the EU and 68% of women born in the reporting country (IOM 2020). In addition, refugee women and adolescent girls, as well as female migrant workers are the most vulnerable groups and are at greater risk of potentially being subject to poorly regulated, exploitative and abusive employment sectors and practices (O'Neil, Fleury and Foresti 2016)

De Jong (2000, p.317) proved that gender roles such as 'marital status and dependent care responsibilities' are key determinants of migration. While marital status reduces the incidence of migrations for both men and women, having dependents increases migration of males, only. Thai women's increasing roles outside households (where low-income expectations in local communities are often the norm) is a contributing factor increasing women's migration. In contrast, care responsibilities reduce migrations among Thai women. The author emphasised that gender roles and norms are strong determinants of migration decision-making in Thailand compared to other socioeconomic variables such as human capital, income, and land ownership (ibid.).

Understanding drivers of migration and their variability amongst various regions of origin and over time are crucial for formulating narratives about future migration, predicting its levels, and policy planning. Van Dalen et al. (2005), on a study of out-migration from four African countries, found that men and women possibly have different emigration intentions. While men are more motivated by economic factors, women make decisions on migration based on their educational attainment, as well as factors related to family, such as

family reunification and economic reasons. Migration intentions of women are also affected by the values represented by the Western world and that can be approximated by the attitude towards unmarried women moving abroad. Social networks are important for both genders.

Williams (2009) focused on how gender moderates the relationship between education and migration in Nepal. With cultural norms that men are more likely to work abroad than women, the effect of education is stronger on male migration: educational attainment has a positive effect on migration for men, while enrolment decreases propensity to emigrate. Among women, educational attainment does not show a significant impact on migration, but enrolment is negatively related to out-migration. In addition, married women are very likely to experience migration at least once in their lifetime. Those findings supported a hypothesis about the roles of gender roles and norms on migration in Nepal: male migration is more likely motivated by employment, while female migration is related to marriage. In recent years, educational attainment had a stronger effect on female migration, showing that male-female relations are changing.

Further, Sander et al. (2013) examined the effects of marriage-related migration. This type of migration can be stimulated by age-sex structure imbalances, marriage 'squeeze' (finding spouses from certain age groups), and by a preference for a partner of native ethnic origin (ibid. pp.17-18). Further, the authors found that gender differences are stronger in emigration from developed countries. In some countries, such as Montenegro, Albania, and the UK, female migration rates are higher than male rates (ibid. p.23, Figure 3).

O'Neil et al. (2016) provided an overview of the role of gender in migration. In worldwide trends, female migrants are almost as numerous as men are. In 2015, 48% of all international migrants were women. There are diverse reasons for increasing female migration. Besides employment opportunities, women are likely to migrate to countries that have less discriminatory social institutions than their origin (Ferrant et al. 2014; Ferrant and Tuccio 2015). The numbers of females are increasing in both high-skilled and low-skilled migration. High-skilled female migration rates were larger than the high-skilled male migration rates, for example, in sectors such as education, health, social work, and nursing. Meanwhile, gender segregation strongly affects low-skilled migration among women, such as domestic workers and caregivers. Low-skilled female migrants are maintained in the informal sector in relation to the feminisation of domestic service and care work.

Bailey and Mulder (2017) show that highly skilled migration, especially from the global South to global North, is related with gender, class, and ethnicity. For example, gender norms in countries of origin can be contributing factors for skilled women to migrate. Likewise, social discrimination against class and ethnicity can also be push factors for emigration.

Kofman (2012; 2014) analysed high-skilled immigration policies in Europe from a gender perspective. In Europe, female migrants' occupations are relatively highly concentrated in sectors such as education, health, and social services, whereas male migrants dominate sectors such as IT. Those feminised sectors are less recognised as skilled occupations in national and European policies, which results in a mismatch in female migrants' educational attainment and their employment. In 2017, 40% of employed migrant women in the EU were overqualified for their positions, with female refugees being worst off in terms of labour market inclusion (IOM 2020). Kofman (2012) further pointed out that relatively less interest is given to skilled female migrants as there is a prevailing gender order in skilled migration and disproportionate care responsibilities, and spouses of labour migrants have more difficulties in keeping their professions. Kofman (2014) also suggested that female migrants' maternity leave and care responsibilities should be more valued and reflected in migration policies, such as earning more points in point-based visa schemes.

Shreeves (2016) reached similar conclusions in an overview of migration and integration policies from a gender perspective. The author pointed out that discrimination and gender-based violence may be overlooked in asylum and admission procedures. If gender issues are not included in the asylum systems and integration policies, it may lead to discrimination of females and girls.

Opinions in the academic literature on the effect of educational attainment and gender on the propensity to migrate are diverse. Some authors focused on the relationship between gender and skilled immigration (Docquier, Lowell and Marfouk 2009; Dustmann and Glitz 2011; Sander et al. 2013; Kofman 2012; 2014). For instance, experts surveyed by Sander, Abel & Riosmena (2013) considered movements of skilled migrants to be ideal with increased global competition. Regarding low-skilled migration, there was a concern about labour shortages in certain sectors, while some authors suggested that manual labour would be replaced by capital investment (Kyambi et al., 2018). More severe gender occupational segregation occurs in low-skilled areas (Cuban 2010; O'Neil et al. 2016). Low-skilled female migrants are likely to be maintained in the informal sector. The number of female migrants grows, but many of them take low-skilled or unskilled jobs (Cuban, 2010). Unskilled female migrants are also often more isolated and less aware of their rights (O'Neil et al. 2016).

Gender issues in EU countries might be categorised into four: labour market participation, family reunification, international protection, and gender-based violence (EIGE 2020). In the FUME Delphi study, we pay more attention to the first two categories, as our interest is in revealing the association between skill levels and gender issues among migrants. Still, female migrants are more likely to be unemployed than males, and deskilling, i.e., under-use of their qualifications, is more severe among female migrants (ibid.). More specific policies may, thus, be necessary to increase labour participation of female migrants and reduce the gaps between their skill levels and jobs.

### 2.2.3 Trends in migration policies

Currently, EU immigration policy consists of three main pillars: managing regular immigration, combating irregular immigration, and promoting integration<sup>4</sup>. At the EU level, regular immigration of highly qualified persons is managed by the 'EU blue card'<sup>5</sup> and by special residence and work permits. Most of the other residence and work permit schemes follow national policies. For example, some countries use a quota system for certain jobs (Southern EU), labour market tests (Germany) and provide shortage occupation lists (France, Spain), while some countries have more liberalised labour immigration policies (Ireland, Sweden). Next, the EU tackles irregular immigration by applying the Common European Asylum System and seeks to ensure that return measures are effective. Lastly, integration policy includes supporting family reunification, which relies more on national policies (e.g., family-friendly migration policy, or invitation scheme).

Work by Helbling and Kalkum (2018) provided an overview and context for historic migration policy trends in the EU. For example, Western Europe has typically pursued restrictive policies since the mid-1970s. Further, extensive collaboration at the EU level, in areas such as asylum policy, has emerged and been pushed forward in recent years. A liberalization trend has been observed in the three policy fields of family reunification, labour migration and asylum in 1980s and 1990s. Convergence has also been found in EU countries in the above three fields. This can be exemplified by, e.g., the European Agenda on Migration (e.g., European Commission 2019a) and New Pact on Migration and Asylum (European Commission 2020).

Further, Bilgili (2015) found that immigration and integration are central topics to European policy making. For example, Denmark, Germany, Norway, Sweden and Switzerland subsidise jobs and job search assistance

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<sup>4</sup> <https://www.europarl.europa.eu/factsheets/en/sheet/152/immigration-policy>

<sup>5</sup> <https://www.consilium.europa.eu/en/press/press-releases/2021/05/17/legal-migration-council-presidency-and-european-parliament-reach-provisional-agreement-on-scheme-to-attract-highly-qualified-workers/>

for migrants, though more research is still needed in the area of recognition of foreign qualifications. Some countries (e.g. Sweden, Switzerland) also provide vocational and non-vocational training (particularly for women), language training, and general introduction programmes. Finally, some policies benefit entrepreneurial migrants, for example by activating providing subsidies for start-ups (Germany).

In Southern European countries, international migrants have replaced low-skilled jobs largely in the informal economy: e.g. the services sector (mainly domestic work, retail trade, hotels and restaurants), construction, manufacturing, and agriculture. Notably, these countries feature labour-intensive economic sectors with strong labour demand for immigrants in the informal sector (Peixoto et al. 2012). In the region, three main policies can be considered: 1) labour migration policies, 2) control policies, and 3) integration policies (ibid.). Invitation schemes and quota systems are based on labour market needs and on labour market tests and are designed to reduce irregularization (ibid.). Quota systems are quite common in Southern Europe, but the complexity and inefficacy of the systems have been pointed out (ibid.). Because of large irregular migration flows, Southern European countries have 'practised random public controls in efforts to stem irregular migration' (Peixoto et al. 2012, p.132). European Social Fund programmes and the European Integration Fund have had a positive impact on the socio-economic integration of immigrants. However, at the national level, Southern European countries 'have developed a reactive, rather than proactive, framework for immigrant integration' (Peixoto et al. 2012, p.136). The third (voluntary) sector has particularly played a significant role in integration of immigrants (ibid.).

There is a push towards increased cooperation of EU Member States in forming common migration policy, such as the ones in the above-mentioned New Pact on Migration and Asylum (European Commission 2020; see also Dimitriadi 2020 and Carrera 2021 for critical appraisals), and even when migration has been highly politicised in many countries. Therefore, for the creation of the migration scenarios for Europe, it is important to establish the narratives reflecting what experts may perceive as priorities in migration policymaking in the next 10 years. Then, the numeric scenarios that reflect the assumed levels of future migration into and within the EU should remain consistent with those narratives and policy priorities.





Picture: Gabriella Clare Marino/Unsplash.com

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## 3. Delphi survey on migration drivers and policies

Based on the literature review and recent experiences with the Delphi method in migration studies, the FUME Delphi study has been specifically designed to avoid eliciting quantitative information about migration. Rather, the questionnaire was designed so that it, firstly, did not require any prior understanding of statistics, as this has been shown to create technical obstacles in eliciting quantitative information (e.g., Wiśniowski et al. 2013). Secondly, we aimed at eliciting information that does not need to “converge” to be useful for the project purposes. Again, studies have shown that experts may have diverging opinions that are less useful in statistical models (ibid.). Thirdly, we attempted to engage policymakers or, at least, those directly involved in advising policymakers. In questions related to future policies, we also highlighted that the questions related to what experts **expected** to happen, rather than what policies they **preferred** to be implemented, in the next 10 years (except for one question on gender-related issues; see Section 4.3.2). The purpose was to produce outcomes that are not disjoint from already existing migration policies, or that might be considered extremely implausible by the policymakers.

The first condition was mostly met except for the questions that elicited probabilities of various scenarios of the COVID-19 impacts in Round 1; Round 2 answers were all valid. The second condition impacted the contents of the survey, that is, the focus was on eliciting heterogeneous information that can subsequently be used in preparing alternative narratives based on the experts’ opinions and their justifications for their selections (WP3.4). The second round of the survey provided the experts an opportunity to update and further motivate their answers, in light of the aggregated answers and feedback from the first round.

### 3.1 Survey design

As explained in Section 2.1.2, the FUME project Delphi survey was designed to elicit information from experts on migration policies, including those involved in policymaking and advising policymakers. To obtain the information on the key aspects of future migration in the EU, we divided the survey into five topic areas:

- I. Drivers and motivations of immigration to the EU,
- II. Composition of migration by skill levels,
- III. Composition of migration by gender,
- IV. Policies on migration,
- V. Impacts of the COVID-19 pandemic.

The first topic (Question 1; see Appendix 6.1 for the full questionnaire) elicited information on the drivers of migration in five domains: demography and education, economy, environment, governance and society. The elicited information will be used in developing narratives of future migration within the EU and from various regions into the EU. Elicited information will also supplement theory-driven gravity-type forecasting models of migration. The experts were asked to provide the most relevant drivers for each migration corridor<sup>6</sup>, that is from six regions of the world (Europe outside the EU, Asia, Middle East and North Africa, Sub-Saharan Africa, Latin America and the Caribbean, and Northern America), to four regions of the EU (Northern, Eastern, Southern, and Western). The experts also had an opportunity to provide additional drivers and specify other sending regions of the world.

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<sup>6</sup> A migration corridor is a directed path from origin to destination. In the questionnaire, we used term ‘route’ for corridor.

The second topic included four questions (Questions 2-5): two on skilled and two on low-skilled migration. In both rounds, we asked the experts to specify up to three corridors that are likely to be the most important between the four EU regions<sup>7</sup>, and up to three corridors from regions of the world into the EU regions, in the next 10 years. Skilled migration was defined as labour migration in high-skilled or medium-skilled jobs: IT, corporate managers, health professionals, scientists, and education; low-skilled migration was defined as labour migration in low-skilled jobs: services or trades, domestic workers, and caregivers. The output from these questions provides information on the decomposition of migration by skilled vs low-skilled migrants, as predicted by the experts.

The third topic area aimed at eliciting information on the importance of gender-oriented migration policies, and the predicted "gender gap" for future migration. During 2009-2018, the proportion of flows of male immigrants to the EU-27 member states was 54%, whereas for females it was 46% (according to the Eurostat database). However, as shown in Section 2.2, there is gender segregation among high-skilled occupations (Kofman 2014). Highly skilled migrant women not only have higher rates of migration than low-skilled women do, but they are also more likely to migrate compared with highly skilled men (O'Neil et al. 2016, p.9). Therefore, this topic area attempted to elicit experts' predictions on the future migration gender gap (Question 6). In Question 7, we asked about the most important issues related to gender of migrants that should be considered by policymakers in the EU. These included low labour force participation of female migrants, concentration of female immigrants in low-skilled jobs, caring responsibilities, occupational gender segregation in skilled jobs, and integration of female immigrants. Importantly, Question 7 was the only question that aimed at eliciting subjective opinion on the issues that **should** be, rather than will be, considered in future policymaking.

The fourth topic aimed to elicit likely priorities in migration policies in the next 10 years. In Question 8, experts were asked to choose amongst policies, such as extending the EU Blue Card system, extending an immigration quota system, providing a shortage occupation list, liberalising labour migration policies, introduction of a point-based system, supporting family-friendly migration policies, moving towards more gender-specific migration policy, and supporting work visas for higher-education international graduates. Further, the experts were invited to comment on the challenges of implementing selected policies and on the importance of the gender-balanced migration policy (Question 9).

With the last topic area, we attempted eliciting information on the expected impact of the COVID-19 pandemic in the next 10 years on economic growth in the EU (Question 10). This information will be utilised in creating narratives that include a recovery from the COVID-19 pandemic in the EU and outside. The outputs from the Delphi survey can also be used in gravity-based migration forecasting models. Further, other potential impacts of the pandemic, including those on future migration policies, were elicited (Questions 11-12). This topic has been added because of the developing situation related to the pandemic and the uncertainty it may have on the internal and international migration in the EU.

The last three topic areas or six questions also invited experts to comment on each question and qualitative data was gathered. In Round 1, a majority of experts provided qualitative responses to most of the question. In Round 2, the responses were more scarce, with about two qualitative responses per question. The purpose of these questions was to add depth and provide additional advantages, for example, inviting answers the researchers may not have initially considered. To analyse these responses, a thematic analysis was used to provide a consistent method of analysis across multiple questions and identify themes in the data. Following

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<sup>7</sup> The regions were defined as 1) Eastern EU: Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia and Slovenia; 2) Northern EU: Denmark, Finland, Sweden; 3) Southern EU: Cyprus, Greece, Italy, Malta, Portugal, Spain; 4) Western EU: Austria, Belgium, France, Germany, Ireland, Luxembourg, the Netherlands.

a recommendation of Bazeley (2009), qualitative comments for each question were gathered into a 'matrix' on Microsoft Excel and data were highlighted and quantified. In a similar manner to Strauss and Corbin (1998), concepts, likened to raw units of data, were gathered into higher order categories. Using these more abstract levels helped to provide larger explanatory power – more so than simply describing disparate themes, and also helped map relationships between issues that are often heavily interlinked (Bazeley 2009). When a larger number of experts commented on specific topics, this provided an additional indication of issues they felt to be important in extension to the quantitative aspect, i.e., voting for pre-defined options. An additional useful technique that was incorporated from thematic analysis was considering potentially divergent views within comments that helped stimulate richer analysis and thinking (Miles and Huberman 1994; Bazeley 2009).

### 3.2 Experts

As suggested in the literature and examples of other Delphi studies (Section 2.1.2), the selection of experts is an important yet challenging task. In this study, we aimed at experts that have experience in policymaking or advising policymakers in the area of migration. They should also have a broad understanding of the migration patterns across all EU Member States and in all five topics covered by the survey. Finally, an important factor is to seek heterogeneity of experts' backgrounds.

In the final study, we aimed at around 10-15 responses. To maximize the chances of achieving this result, we invited a total of 48 experts from various organisations (19 from the European Commission (EC) and other EU institutions), European Parliament and other think tanks (12), NGOs (3), international organisations (6), academia (8). Some experts had double affiliations or were involved in advising policymakers in the past. We achieved a gender balance by inviting 24 female and 24 male experts. The respondents were selected based on the project members' networks and their past involvement in policymaking and/or advising policymakers at a supra-national level. We appreciate that not all invitees indeed might have had expertise in all five areas covered in the study, nor that it was related to all EU Member States. To mitigate this limitation, we targeted experts with heterogeneous backgrounds and past employment histories, as well as working for various types of organisations and in various countries.

### 3.3 Pilot round

The first round of the Delphi survey was preceded by a pilot round. For it, we recruited 13 participants from the FUME project, its partner institutions and from the project Advisory Board. One of the experts was a person with extensive knowledge of migration policies and experience in advising policymakers. We consulted her about developing the questionnaire as well as recruiting Round 1 respondents. The FUME project collaborators were also consulted and provided feedback to the questionnaire.

The pilot version included all five topics as the Round 1 survey, without the last question on other effects of the COVID-19 pandemic (Question 12). This question was added at a prompt from a pilot round expert who suggested that learning more about the consequences of the pandemic might be useful to the project's objectives and narratives that are created as part of the FUME's WP 3.3.

The pilot survey questionnaire had the same structure as the Round 1 questionnaire appended in 6.1. The questionnaire was developed in SelectSurvey.NET software, for which University of Manchester has a license. For each question, there was an additional space to provide comments specifically on the question content and clarity. Respondents provided useful suggestions on how to rephrase some of the questions (e.g. remove longer preambles to Questions 6 and 7 and replace them with short and focused questions), add options (Question 8), and suggested non-EU Europe (Balkans and Eastern Europe, Caucasus) to be added in Questions 1-5. As mentioned above, one of the pilot round experts elaborated on other predicted consequences of the pandemic and this prompted adding Question 12 in the Round 1 questionnaire.

The pilot round of the survey has been fielded between 7 December 2020 and 10 January 2021. Out of 13 invitees, 11 respondents returned fully or partially filled-in questionnaires.

### **3.4 Delphi Round 1**

The first round of the Delphi study was fielded between 1 April and 5 May 2021. It was distributed to the experts in a personal email with an invitation letter, information about the project, and a link to the questionnaire that also contained an introduction and a purpose of the study. As in the pilot round, the questionnaire was developed in SelectSurvey.NET software. One of the experts responded that the online version is blocked by their organisation's IT and a MS Word version was prepared and provided to them.

Out of 48 invited experts, 21 attempted filling in the questionnaire and left their contact details; from them, 12 provided responses. One of the responses contained answers to one question (8) only. For most experts, it took around 30 minutes to fill in the questionnaire. Two experts took considerably longer time, though the survey could remain open for as long as the web browser was open. Additionally, the answers from one pilot round expert, whom we consulted extensively about the survey (see Section 3.2.1), were also added to the final Round 1 tally presented in this report.

### **3.5 Delphi Round 2**

The second Round was fielded between 26 June and 31 August 2021. The questionnaire was sent to the 12 experts from Round 1 and one expert whose answers we added from the pilot round. We received 10 full responses. Five of the experts were female; seven had their primary affiliation with various European Union agencies, two were academics, and one was from the NGO.

The Round 2 questionnaire contained a set of 12 questions on topics as in Round 1, as well as aggregated results from that Round, including anonymised individual comments and justifications. As described in Section 3.1, Questions 1, 7, 8 and 12 in Round 2 questionnaire were modified, compared with Round 1. Question 1 was modified to reduce the complexity of the task and required selecting a maximum of two most relevant drivers for each origin region, rather than four EU regions of destination. Questions 7, 8 and 12 in Round 1 contained a multiple options list, while in Round 2 we asked the experts to provide a ranking of the options extended to include those added in Round 1 as category "Other". Finally, the answers from the three experts who responded only in Round 1 were added, where appropriate, to produce final summaries presented in the next section.



Picture: Baldassare Caradonna/Unsplash.com

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## 4. Results

This section presents the final results of the Delphi survey, based on responses from 13 experts. The results are described in subsequent subsections corresponding to the five topic areas of the study.

### 4.1 Drivers and motivations of migration in the EU

The formulation of the first question differed between Rounds 1 and 2, thus, we present the summaries from both rounds. In Round 1, the question related to the drivers and motivations of migration to and within the EU. Experts provided their selection of drivers for a given migration corridor, as shown in Appendix 6.1. They were free to choose as many drivers as they pleased for some or all of the corridors, thus, the total number of selections (of drivers and corridor) exceeded the number of experts. In Round 2, the experts were asked to select two most important drivers for each region of origin, without detailed region of destination.

In Figure 1, the responses from Round 2 are presented for each origin (panel A), as well as aggregated over all origins (panel B). Panel B shows wage differences between origin and destination regions were by far the most often expected driver for migration to the EU over the next 10 years (No. 6 in the questionnaire)<sup>8</sup>, obtaining 25 selections. The second most often selected driver was political stability and conflicts (No. 9, with 18 selections), followed by supply of skilled job opportunities in the EU (No. 2; 15 selections), then population growth (No. 1) and social networks (No. 12), both with 13 selections. Drivers that were not selected at all were multiculturalism and tolerance vs increased intolerance (No. 13) and gender equality (No. 14).

The importance of migration drivers differed between regions of origin. Where wage differentials were deemed important, these were a particularly clear “winner” for both non-EU Eastern Europe, and the Middle East/North Africa. However, for the latter region, also population growth, political stability and networks were often selected. Political stability was also considered to be most relevant for Sub-Saharan Africa (along with population growth), and Latin America and the Caribbean. For the latter origin, experts also pointed to social networks, as well as wage differentials. When considering why individuals may migrate from Northern America, supply of skilled job opportunities was clearly predicted to be the most important factor, followed by social welfare systems and attractive EU lifestyle drivers. The selection of drivers for migration from Asia was rather diverse, which might be due to a large and heterogeneous population in the continent. Wage differentials and demand for low-skilled jobs in the EU (No. 3) were joint top most often selected; and were followed by only a slightly smaller number of selections for population growth and demand for education. Finally, environmental factors were selected mainly for Sub-Saharan Africa.

In Figure 2, the expert selections of drivers per each origin-destination corridor are shown, based on Delphi Round 1 answers. A clustering of the experts' selections can be observed between the origin regions but not so much for destinations. For example, for migration from other European countries outside of the EU, economic, demographic, and educational drivers were dominant. Especially, demand for low-skilled jobs (No. 3) and wage differentials between origins and destinations (No. 6), which prevailed for all destination regions. For the Northern EU, experts also pointed to social welfare systems (No. 10) as an important driver of migration for non-EU Eastern European countries (including the Balkans). Similarly, drivers related to demography and education, especially demand for low-skilled jobs (No. 3), dominated for migration from Asia.

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<sup>8</sup> Interestingly, in Round 1 survey, the most often selected driver was demand for low-skilled jobs (3).

Governance-related factors were often deemed important by experts, usually along demographic and education-related drivers, for migration from Africa and especially to Northern and Western EU. Those drivers were also selected for migration from Latin America and the Caribbean, which is consistent with Round 2 answers.

Finally, the Western and Northern EU show the most diverse selections of drivers, especially for migration from Africa and Asia. As also shown in Figure 1, for migration from Northern America, the most often selected drivers were related to the supply of skilled jobs in the EU and demand for education, but most of the selections were made for Northern EU destinations.

Figure 1. Distribution of selections of migration drivers A: for all origin regions; B: aggregated over all origin regions. Source: own elaboration based on answers from 10 experts, Delphi Round 2.

Notes: the drivers of migration included (see Appendix 6.1) 1. Population growth (e.g. a large young-age population, accelerated ageing), 2. Supply of skilled job opportunities, 3. Demand for low-skilled jobs, 4. Demand for education, 5. Economic growth differences between origin and destination, 6. Wage differences between origin and destination, 7. Climate change (e.g. slower vs faster global warming), 8. Pro- vs anti-immigration policies (e.g. open vs restrictive to asylum seekers), 9. Political stability and conflicts, 10. Social welfare systems, 11. Family reunification, 12. Social networks, 13. Multiculturalism and tolerance vs increased intolerance, 14. Gender equality, 15. Attractive EU lifestyle\*, 16. Weather\*. \*These drivers were added based on experts' suggestions in Round 1.

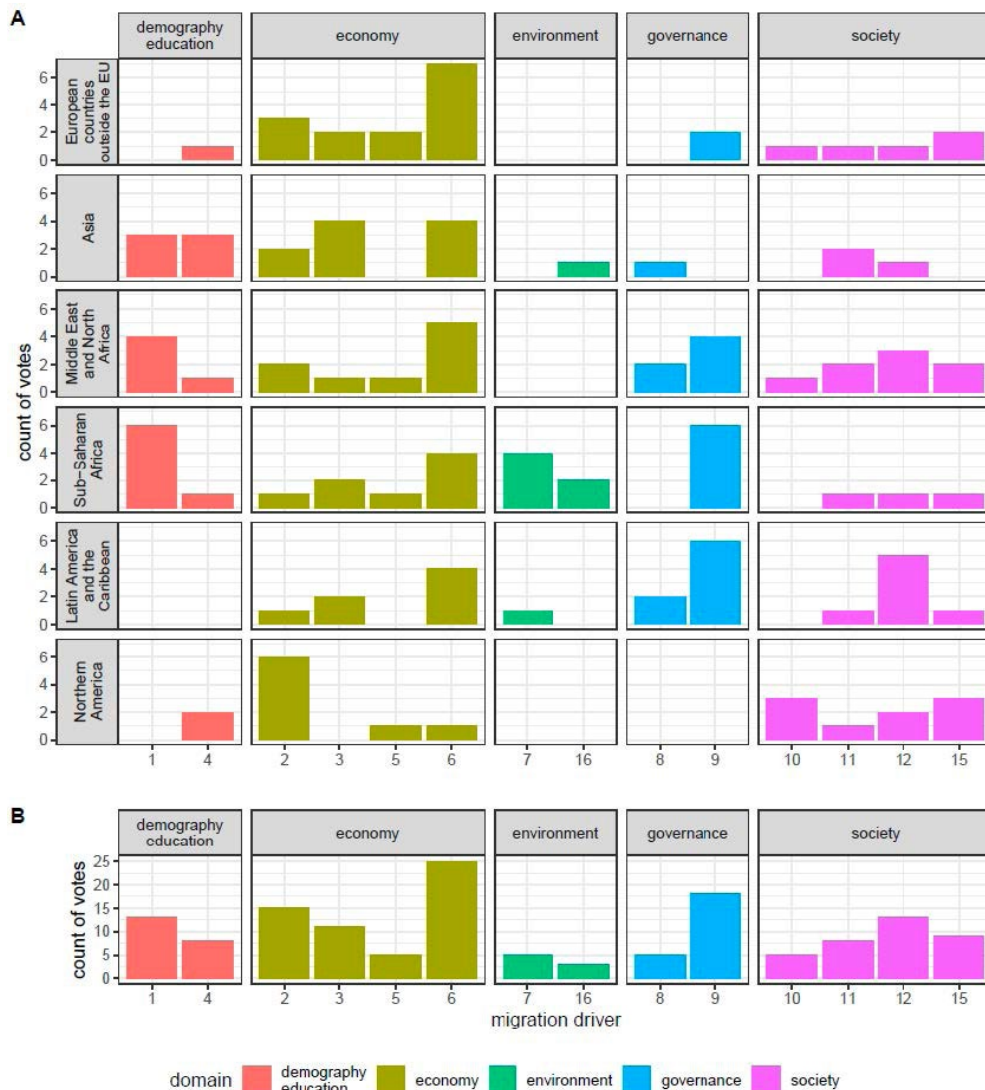


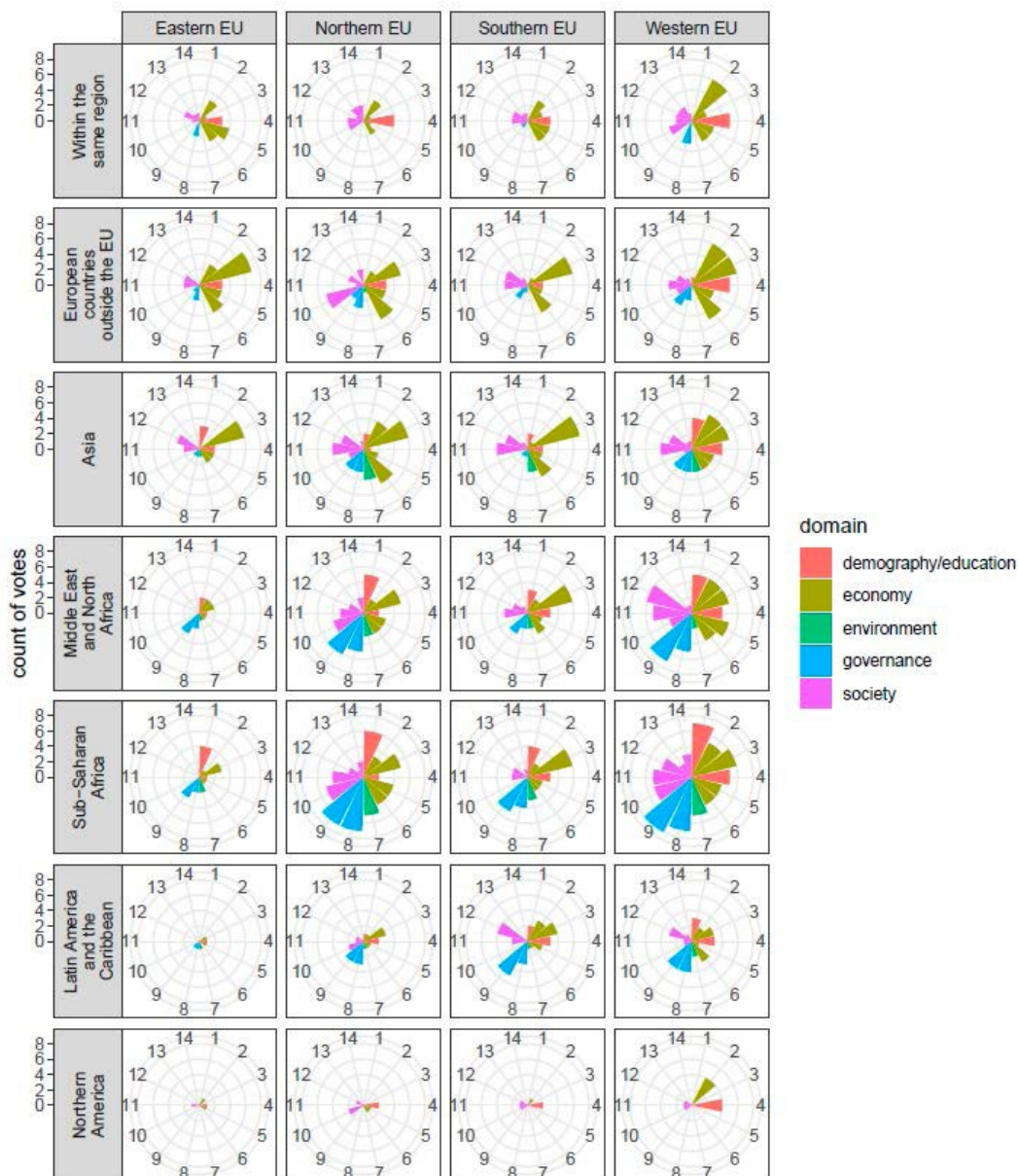


Figure 2. Distribution of selections of migration drivers and motivations between migration corridors within and to the EU in the next 10 years.

Source: own elaboration based on answers from 10 experts, Delphi Round 2.

Notes: numbers around circles denote migration drivers – see Figure 1 and Appendix 6.1. The total tally of the selections to all drivers and all corridors from the 12 experts (Round 1) was 824. The domain and origin “Other” were removed due to a very low number of counts.

Origin (rows) / Destination (columns)



## 4.2 Composition of migration by skill level

In the second part of the survey, respondents were asked to select what they thought would become the most prominent migration corridors in the next 10 years, specifically for movement in skilled and low-skilled migrants within and from outside of the EU.

### 4.2.1 Skilled intra-EU migration paths

In Table 1, we present the proportions of selections cast by the experts for the migration corridors within the EU, for skilled migrants. Experts expected that the Eastern EU (36%) and Southern EU (36%) are likely to become prominent origin regions, while Northern EU (39%) and Western EU (42%) are likely to become popular destination regions.

Regarding specific routes that are likely to be popular, three were particularly highly expected, including the Eastern to Western EU (19%), Southern to the Northern EU (17%) and Southern to the Western EU (15%), whilst the Eastern to Northern EU (10%) also received a larger proportion of selections.

*Table 1. Assessment of the importance of skilled internal migration within the EU corridors in the next 10 years. Percentage of selections by the experts.*

*Source: own elaboration by using results of the Delphi study. Twelve experts provided an overall 59 selections.*

Origin/Destination	Eastern EU	Northern EU	Southern EU	Western EU	Total
Eastern EU	3%	10%	3%	19%	36%
Northern EU	2%	7%	3%	2%	14%
Southern EU	2%	17%	2%	15%	36%
Western EU	2%	5%	2%	7%	15%
Total	8%	39%	10%	42%	

### 4.2.2 Skilled migration paths from Outside the EU

For skilled migration from outside the EU (see Table 2), experts predicted by a notable margin that non-EU Balkan and Eastern European countries (35%) are likely to be biggest sending region, followed by Asia (23%). Similar to intra-EU migration of skilled persons, the destination region that received the largest number of selections was the Western EU (43%). However, both the Northern and Southern EU were given nearly identical scores, with 26% and 25%, respectively.

Interestingly, for the specific route with the highest number of selections, like with intra-EU migration, Balkan and Eastern European countries (non-EU)<sup>9</sup> to Western Europe (17%) received the largest proportion of predictions by a large margin. Other highly expected routes included Asia to the Western EU (13%), and non-EU Balkan and Eastern European countries to the Northern EU (10%). Notable patterns also included the Southern EU being the most often selected destination for migrants from Latin America and the Caribbean (7%), Middle East and North Africa (6%) and Sub-Saharan Africa (6%).

<sup>9</sup> This category was added based on feedback from the pilot round.

*Table 2. Assessment of the importance of skilled migration from regions outside the EU corridors in the next 10 years. Percentage of selections by the experts.*

*Source: own elaboration by using Round 1 results of the Delphi study. Twelve experts provided an overall 69 selections.*

Origin/Destination	Eastern EU	Northern EU	Southern EU	Western EU	Total
Asia	1%	7%	1%	13%	23%
Balkans and Eastern Europe (non-EU)	4%	10%	3%	17%	35%
Latin America and the Caribbean	0%	0%	7%	0%	7%
Middle East and North Africa	0%	1%	6%	4%	12%
Northern America	0%	4%	1%	6%	11%
Sub-Saharan Africa	0%	3%	6%	3%	12%
Total	6%	26%	25%	43%	

#### 4.2.3 Low-skilled intra-EU migration paths

In Table 3, we present the proportions of votes cast for migration corridors within the EU for low-skilled persons. In a similar manner to skilled intra-EU migration, the Eastern EU (46%) and Southern EU (28%) received the highest number of selections as likely origin regions, whilst the Western EU (44%) was the highest selected destination. The other most often selected destinations were the Northern and Southern EU, with 28% and 22%, respectively. This differs from the destinations pointed to by the experts for migration of skilled persons where the Northern EU was more selected

Considering specific routes, notable voting patterns included the Eastern–Western EU and Southern–Western EU coming in the top three with 19% of selections, whilst the Southern to the Northern EU route was much less prominent for low-skilled migration (7%) than in skilled migration (17%). The Eastern EU received the largest number of selections for every destination country, as well as three of the top four highest proportions of selections on specific routes.

*Table 3. Assessment of the importance of low-skilled internal migration within the EU corridors in the next 10 years. Percentage of selections by the experts.*

*Source: own elaboration by using results of the Delphi study. Twelve experts provided an overall 54 selections.*

Origin/Destination	Eastern EU	Northern EU	Southern EU	Western EU	Total
Eastern EU	4%	11%	13%	19%	46%
Northern EU	2%	4%	4%	4%	13%
Southern EU	0%	7%	2%	19%	28%
Western EU	0%	6%	4%	4%	13%
Total	6%	28%	22%	44%	

#### 4.2.4 Low-skilled migration paths from Outside the EU

Table 4 shows the voting patterns for corridors from outside of the EU to the four individual regions. We observe that the voting was more spread-out for low-skilled migration than was the case with skilled migration. Again, the Balkans and Eastern Europe (non-EU) was the most selected sending region (25%), but this came out joint top with Sub-Saharan Africa (25%); Asia (22%) and the Middle East and North Africa (15%) all received notable scores. Experts chose the Southern EU (38%) and the Western EU (38%) as the most popular destination regions for low-skilled migrants from outside the EU. This differs slightly from the opinions on skilled migration, where the Western EU was a top selection, but followed by the Northern and Southern EU with almost the same vote tallies.

Selections of specific routes diverge considerably from those picked for skilled migration. Firstly, Sub-Saharan Africa to the Southern EU and Western EU came out most popular, with 12% of the selections each. Secondly, the Balkans and Eastern Europe (non-EU) to the Western EU (9%) was again highly selected, as was the Middle East/Northern Africa to the Southern EU (8%) and the Western EU (8%). Interestingly, Asia, the Balkans/ Eastern Europe to all four EU destination regions all received 5% or more of selections. We also observe that Southern EU was slightly more preferred for migrants from Asia (8%), while the Western EU was selected to be the most common destination for those coming from the Balkans and Eastern Europe (9%). Depending on the actual size of migration, this may lead to asymmetrical distribution of migrants within the EU.

*Table 4. Assessment of the importance of skilled migration from regions outside the EU corridors in the next 10 years. Percentage of selections by the experts.*

*Source: own elaboration by using Round 2 results of the Delphi study; twelve experts provided an overall 65 selections.*

Origin/Destination	Eastern EU	Northern EU	Southern EU	Western EU	Total
Asia	5%	5%	8%	5%	22%
Balkans and Eastern Europe (non-EU)	6%	5%	5%	9%	25%
Latin America and the Caribbean	0%	0%	6%	2%	8%
Middle East and North Africa	0%	0%	8%	8%	16%
Northern America	0%	3%	0%	3%	6%
Sub-Saharan Africa	0%	0%	12%	12%	25%
Total	11%	12%	38%	38%	

#### 4.2.5 Summary

Summarising, experts predicted that the most popular destination for both skilled and low-skilled migrants would be the Western EU, followed by the Northern EU. The Southern EU is also expected to be an important recipient of low-skilled migrants (but not skilled ones), mainly from Africa and Latin America and the Caribbean. Simultaneously, the Balkans and Eastern Europe (non-EU), and Asia were predicted to be the most important origin regions for both skilled and low-skilled migrants. Additionally, experts predicted that the low-skilled migration would originate in Africa.

## 4.3 Composition of migration by gender

### 4.3.1 Gender balance of immigrations flows

Experts were provided with the statistics from Eurostat database stating that between 2009-2018, the proportions of male and female migration flows into the EU-27 were 54% and 46%, respectively. The experts were then asked to predict whether they believed this gender gap would increase, be maintained, or decrease, in the next 10 years.

As shown in Table 5, a larger proportion of experts (67%) predicted a decrease in gender gap, whilst 33% of experts expected that the gender gap would be maintained. No expert anticipated for an increase in migration gender gap. In this question, we observed a significant change from Round 1, where two experts voted for an increased gender gap.

One expert who expected a decreased gender gap to prevail, predicted this would be due to employment demands in sectors where females often work, such as care work, tourism, domestic work, and agriculture. Other experts who selected a decrease also justified their choice through explaining that females moving to take up jobs in care work is likely to be a key reason, along with family reunification.

*Table 5. Proportion of selections received to the question on the expected gender balance change in the next 10 years.*

*Source: own elaboration by using Round 2 results of the Delphi study.*

Expected gender balance	Tally	%
Decreased gender gap	8	67%
Increased gender gap	0	0%
Maintained gender gap	4	33%
Total	12	

When justifying their answers, several experts selected a decreased gender gap prevailing where females are likely to move to fill the demand for low paid jobs, particularly care work and professions typically dominated by females such as tourism, domestic work, and agriculture. This also includes one commenting that this could also see the increased 'feminization' of migration. Another expert commented that educated females are likely to move to Europe due to more potential opportunities for skilled jobs or perceived gender equality.

Meanwhile, several experts who believe a maintained gender gap will prevail remarked that men are likely to continue to move, however, family reunification will lead to a balancing of this. Another individual who argued for a reduced gender gap believes that while family reunification be an important factor for increased female migration, the sheer demand for occupations in typically female dominated roles will be a much more prominent factor. Also, another expert believes a status quo will prevail where patterns of migration, which rely on collective decision-making at the household level, are unlikely to change over the next 10 years.

### 4.3.2 Gender-related immigration issues

Experts were asked to rank six gender-based issues surrounding immigration and policy in order, that they thought need to be considered by policymakers in the next 10 years. Table 6 presents the scores resulting from the ranking, with higher scores representing more important issues. From the options available, the issue selected most often by the experts was low labour force participation of female migrants. Several experts

also believed the heavy care duties of female immigrants will be a prescient issue. Following this, there was a fairly uniform distribution of scores for issues deemed less important, such as concentration of female immigrants in low-skilled jobs, females working below their skill-level, and integration of female migrants with an emphasis on access to education. Meanwhile, the only option that did not gain much attention was occupational gender segregation in skilled jobs (e.g., more males in IT) which only scored six points and over 50% of experts selected it as the least important issue of the options available.

*Table 6. Total number of points scored from experts ranking gender-related issues that they believe policymakers need to address. Higher ranking points indicate higher importance.*

*Source: own elaboration by using Round 2 results of the Delphi study.*

Specific issue	Ranking points total
Low labour force participation of female immigrants	47
Heavy caring responsibilities of female immigrants	33
Concentration of female immigrants in low-skilled jobs	27
Integration of female migrants including access to education	26
Female immigrants working below their skill-level	22
Occupational gender segregation in skilled jobs (e.g. more males in IT)	6

In qualitative comments, clear categories arose on what was deemed important to respondents, and respondents made links between different issues when asked to elaborate. The first challenge most commented on was low labour force participation for both genders, but particularly for women. This is often reduced by women taking on, and expected to do so in the future, significant proportions of caring responsibilities and therefore will not actively seek work, for example when looking after children or elderly relatives takes up too much time. Several remarked that if policymakers are to address gender-based issues, an integrated approach is needed that also factors in other major policy challenges such as ageing populations.

A combination of issues experts often twinned together were heavy caring responsibilities of female immigrants leading to lower labour force participation. Because low labour force participation also encompasses both those already employed and actively seeking it, factors in care work such as low pay also worsen this problem where there is less incentive to work in the first place. One of the experts also remarked that the pandemic might “reinforce pre-existing unbalances (both low-participation and sectoral ghettoisation)”.

Another challenge that several experts specifically commented on is the importance of prioritising inclusivity and integration. Experts believe policymakers must find ways to particularly encourage female immigrants to improve their own economic situation, whether that is through taking on employment in the first place, or increasing opportunities for better-paid work. Improvements also need to be made relating to increasing awareness among female immigrants of their own working rights, and improve female representativeness in unions. Also related to integration, the need to implement education-based policies was commented on by several experts where initiatives need to upskill migrants, both males and females, and utilize human capital more effectively. This includes improving the ease of access to education and participation in society more generally.

## 4.4 Policy trends on migration, human capital, and gender

### 4.4.1 Priorities in migration policies

In Table 7, we present a summary of the responses on migration-related policies that will likely be prioritised by EU policymakers in the next 10 years. We observe that control and return policies received the highest scores, closely followed by supporting work visas for higher education international graduates. These options were often ranked more highly overall than other policy initiatives related to employment and human capital of migrants, such as lists of occupation shortages (ranked 4th) and extending the EU Blue Card (7th) migration point-based systems (9th). Other answers that received notable scores included prioritisation of intra-EU mobility (3rd), policies driven by labour market demand (5th) and extending immigration quota systems (6th).

The bottom three policies, which were typically ranked towards the bottom by the majority of experts and thus predicted to have a lower chance of being prioritised, included moving towards more gender-specific migration policy, liberalisation of labour migration policies and family-friendly migration policies. However, whilst these policies generally noted to be more 'progressive' scored lower, integration of already existing migrants ranked eighth as a specific policy that may be looked at more closely in the next 10 years.

The analysis of experts' justifications for their choices reveals further patterns. Experts clearly believe that policymakers will likely prioritise labour market needs, and particularly highly skilled jobs. Issues relating to high-skilled graduates were commented on multiple occasions. For instance, one expert remarked policymakers will be cognizant of the need to prioritise the retention of graduates educated in European universities and where not doing so leads to large human capital losses. One expert also commented that the 'war for talent' will become a prominent issue and that very highly skilled workers may prefer other 'attractive destinations' such as Canada and USA that also have less 'fragmented' labour markets.

*Table 7. Total number of points from experts ranking migration-related policies that policymakers are likely to prioritise in the next 10 years. Higher points indicate higher likelihood*

*Source: own elaboration by using Round 2 results of the Delphi study. Based on information elicited from 13 experts.*

*\*These options were added in Round 2 based on experts' comments in Round 1.*

Policy priorities for EU policymakers	Ranking points total
Control and return policies* 87	87
Supporting work visas for higher-education international graduates	83
Intra-EU mobility*	65
Providing a shortage occupation list	56
Policies driven by labour market demands*	53
Extending an immigration quota system	52
Extending the EU Blue Card system	45
Efficient integration of existing migrants*	40
Introduction of a point-based system	34
Supporting family-friendly migration policies	23
Liberalising labour migration policies	19
Moving towards more gender-specific migration policy*	9

Several experts commented on difficulties relating to nation states aligning national and supranational labour market-related regulation, for both highly skilled and low-skilled migrants, that also meet the diverse set of needs of individual Member States. One respondent commented that the EU Blue Card system has been difficult to implement since its introduction and that nation-states have already pursued their own policies, for example, the Netherland’s Kennismigranten programme. That way, the EU countries are likely to compete for talent with each other.

Several also commented that, in the next 10 years, policymakers’ focus would be on a ‘needs must’ basis. Filling vacancies through shortage occupation list is one example. Other issues mentioned include demographic issues such as the looming ‘demographic crisis’, and the need to integrate of already settled migrants in the EU. These will be especially important when one considers that the number of low-skilled jobs is likely to decrease in the future.

Lastly, several experts commented that policies that could potentially benefit immigrants, such as family-friendly initiatives, are unlikely to be prioritized in the context of national governments being likely to pursue politically motivated over ‘socially liberal’ or even economic policies. Several respondents also linked this to difficulties of gaining widespread public consent, e.g., because the wider voting population do not see the value of them or due to anti-immigrant sentiment. One respondent expects that policymakers are likely to persistently prioritise the control and return policies.

#### 4.4.2 Gender-balanced immigration policies

In this question, the experts were asked how much they agreed with the contention that EU policymakers will seek to prioritise policies that focus on addressing gender-based immigration issues such as occupational sex segregation and low economic participation of females. Gender-balanced policies include ensuring that female migrants have access to education and opportunities to improve their skills, providing more care services, or addressing gender wage differences. Overall, more experts agreed than disagreed with the statement (six vs two experts, respectively), while four experts neither agreed nor disagreed with the statement (see Table 8).

*Table 8. Distribution of expert selected on whether gender-balanced migration policies will be prioritised in the next 10 years. Source: own elaboration by using Round 2 results of the Delphi study.*

Answer	Tally	%
Strongly disagree	0	0%
Disagree	2	17%
Neither agree nor disagree	4	33%
Agree	6	50%
Strongly agree	0	0%
Total	12	



When asked to comment, one who neither agreed nor disagreed emphasised that there is a large and highly uneven disparity between different EU Member States about gender-related policies. In some countries, there is already high awareness of such issues and enthusiasm for them, and it is likely that some countries will continue this way. Another expert who agreed with the statement commented that there is visible evidence of major, mainstream policy initiatives already in existence. However, the two respondents who agreed that gender-balanced policies would be a priority, also pointed to practical challenges of implementing them, even if policymakers wanted to. For example, native populations may voice their disapproval of gender-balanced migration priorities if they feel left behind. A further difficulty is that even if such policies are implemented, the practicality of reaching individuals that need them most will be difficult. Finally, such policies might be obstructed by traditional division of labour within migrant households.

Those experts who disagreed also commented that gender issues within the context of policy have typically been less important and this will likely continue to be the case. If, however, demographic or economic needs become a necessity and require large amounts of female immigrants, for instance, in the care sector, this could allow policymakers to justify prioritizing gender-based migration issues in discourses.

## 4.5 COVID-19 pandemic impacts

### 4.5.1 The potential impact of the COVID-19 pandemic on economic growth in the EU

In this part, experts were asked to assign percentage scores totalling to 100% to four different scenarios for how the COVID-19 pandemic will likely affect economic growth in their opinion, over the next 10 years. A large majority of experts, 11 out of 12 (92%) predicted a slow recovery to pre-pandemic growth levels and selected it as their highest or joint highest choice. Two experts selected fast recovery and economic boom as likely scenarios.

However, the distribution of mean percentages scores indicates that experts did not completely dismiss other options, as shown in Table 9. We observe that while “slow recovery” often scored around 50%, fast recovery/economic boom, and economic stagnation were then assigned values around 15-30%.

*Table 9. Experts’ probabilities of four scenarios of economic recovery from the COVID-19 pandemic in the next 10 years, in %.*

*Source: own elaboration by using Round 2 results of the Delphi study. S.D denotes standard deviation.*

	Slow recovery to pre-pandemic growth levels	Fast recovery and economic boom	Stagnation at close-to-zero growth	Persistent negative growth
Mean	50	22	19	9
S.D.	11	12	10	7
Median	50	20	19	10

When invited to comment, a prevalent category that emerged was a number of experts commenting on the difficulties of making this prediction. A second category in relation to this was the difficulty of predicting at an EU wide scale since there is a diverse set of economies amongst Member States. One expert, for instance, predicted Western and Nordic Europe would see slow recovery whilst stagnancy might emerge in Southern and Eastern EU countries. Thirdly, experts also believe this will overlap with and be contingent on the actual policy responses implemented by individual states. They also alluded to the difficulties of predicting what strategies individual states are likely to pursue in the future when the pandemic has changed economic paradigms such as countries moving away from austerity policies. Finally, one experts commented that global

context and factors such as disruption of value chains will likely lead to a slow recovery, rather than a booming economy. They also pointed out to the role of “superstar firms” and digital capitalism in shaping the post-pandemic economic situation.

#### 4.5.2 The potential impact of COVID-19 pandemic on EU migration policies

Meanwhile, when asked to allocated percentages to how they predicted the COVID-19 pandemic impact on migration policies in EU countries, a range of experts distributed the proportions over a range of options (see Table 10). However, a clear top three emerged. Firstly, policies oriented towards high skilled migrants were given an average of 25% probability, which shows clear parallels to Question 8 (Section 4.4.1) where experts predicted policymakers would seek to prioritise work visas for higher-education international graduates. Notably, policies selective towards low-skilled migrants came out lowest with 8% probability. Secondly, the average probability for policies restrictive to groups of migrants was 23%. This also shows similarity to discussion in Section 4.4.1. Thirdly, experts also assigned relatively large probabilities to a situation where the pandemic would have no direct effect on migration policies. This, however, was more ‘polarising’, as indicated by the larger standard deviation (22.5%), where four experts allocated their highest percentages to this, while many scored it at zero, possibly indicating that the pandemic would have some impact. Similarly, more open migration policies was twice allocated a highest score and many assigned it zero probability, hence the larger standard deviation (17.7).

*Table 10. Experts’ probabilities of assigned to likely impacts of the COVID-19 pandemic on migration-related policies in the next 10 years, in %.*

*Source: own elaboration by using Round 2 results of the Delphi study. Note: S.D denotes standard deviation.*

	No direct effect of Covid-19 on migration policies	More open migration policies	Policies selective towards high-skilled migrants	Policies selective towards low-skilled migrants	Policies restrictive to all groups of migrants	Promoting migration within the EU
Mean	20	12	25	8	23	11
S.D.	22.5	17.7	14.9	9.2	16.4	8.7
Median	15	5	22.5	10	23	10

Key to emphasise, while receiving fewer comments on this survey question, the experts still provided several potentially useful insights. In particular, two experts commented on their own uncertainties about the future when considering the heterogeneity of the EU Member States and a wide range of policy strategies they are likely to pursue. One respondent who assigned larger probabilities to policies selective towards highly skilled migrants and restrictive to all migrant groups as their joint top answer, pointed to the high heterogeneity of current strategies related to migration, with some Member States taking notable steps to promote migration whilst others being more restrictive. However, the same respondent also remarked that many EU countries are looking into policies that target highly skilled migrants as it is less problematic “from a political acceptability standpoint”. Similarly, another expert who assigned policies selective towards highly skilled as well as low-skilled migrants also remarked on the large diversity of the EU countries and their current strategies. One expert who predicted no direct effect commented that much of the current movements at this moment are driven by economic reasons where migrants move from low- to high-income countries. This expert also predicted this scenario is likely to continue, and will be much more important than any pandemic-related impacts.

### 4.5.3 Other potential impacts of the COVID-19 pandemic

The last question of the Delphi survey related to broader predictions on possible wider impacts of the COVID-19 pandemic on the EU that will exist in the 10 years. A summary of the ranking of up to 12 options is presented in Table 11. Two related predictions, of accelerated digitalisation (smartification) of economies, and more flexible and remote working arrangements came out clearly on top. Socio-economic impacts in the form of increasing inequalities between the rich and poor came third. Similarly, increasing development gap amongst EU Member States was deemed important (ranked 5th), along with localisation and de-globalisation (ranked 4th).

Meanwhile, in terms of lower ranked options, the impacts deemed least likely to happen included the reduction of welfare states (ranked last), increased efficiency and productivity and regulation of digital monopolists. Further, increased migration-related inequalities and mass 'irregularization' of migrants ranked eighth whilst more attention being paid to health services, welfare arrangements and sustainable policies came in 6th.

*Table 11. Total number of points from experts ranking the potential impacts of the COVID-19 pandemic in the next 10 years. Higher points indicate higher likelihood*

*Source: own elaboration by using Round 2 results of the Delphi study.*

*\*These options were added in Round 2 based on experts' comments in Round 1.*

Effects of the pandemic	Ranking points total
Accelerated digitalisation (smartification) of economies	116
More flexible and remote working arrangements	115
Increasing inequalities between the rich and poor	71
Localisation and de-globalisation	57
Increasing development gap amongst the EU Member States	54
Attention on health services, welfare arrangements and sustainable policies*	48
High and persistent unemployment	45
Increased migration-related inequalities and mass 'irregularisation' of migrants*	44
Increased efficiency and productivity*	30
Regulation of digital monopolists*	30
Reduction of welfare states	26

Regarding comments made by experts, although this question received fewer comments, one expert remarked that the pandemic has seen particularly noticeable changes in government spending strategies, whilst increased attention has also turned to a myriad of issues including implementation of more environmentally sustainable policies, regulation of large technology companies and disruption of value supply chains. Another expert commented that the pandemic highlighted that when jobs are in short supply, migrants in particular are much greater risks of losing their regular status.



Picture: Daniel Tong/Unsplash.com

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## 5. Summary and conclusions

This report documents the work done as part of the WP3.2 of the FUME project. Using a two-round Delphi survey, expert opinion was elicited on future migration drivers, composition of future migration, and migration policy priorities. The second round provided the experts with aggregated feedback from Round 1. This led to some adjustments in answers, which was especially visible in the migration gender gap question (section 4.3.2). We also observed a reduction in variability in responses related to migration composition by origin-destination and skills. One of the experts even commented that he or she noticed the convergence of opinion in the survey. Finally, quantitative responses on probabilities were corrected to become valid responses. Some of the respondents also provided further comments and justifications to their responses.

The results of this survey can be used to: (i) construct migration narratives and quantitative scenarios, (ii) provide supplementary information for predicting future migration, and (iii) recommend policies. The Delphi method is particularly useful for providing information that is difficult to obtain from current available resources and sources of data. The FUME Delphi survey was designed to elicit information from experts working in policymaking or advising policymakers, as well as in non-governmental organisation and academia, to ensure consistency of the scenarios with predicted policy objectives.

Below, we discuss the main findings from the Delphi survey in light of quantitative results generated and the qualitative comments provided by the experts. We also draw on migration and policy literature as a means to embed the predictions made by the experts in a wider context, and to reflect on the qualitative comments. We also describe the limitations of the study, as well as propose directions of the use of these results in preparing migration and population projections.

### 5.1 Discussion

#### 5.1.1 Drivers of immigration and composition of migration by skill level

Experts predicted the most important driver of migration to the EU in the next 10 years will be wage differences between origins and destinations, which have been selected for almost all regions of origin. This is unsurprising as previous studies show that both high-skilled and low-skilled workers are more likely to move to regions where they can get the highest return for their labour (e.g., Borjas et al. 1992; Pritchett and Hani 2020). The second most important driver, especially for Middle East, North and Sub-Saharan Africa, Latin America and the Caribbean, was political stability and conflicts. Then, the experts also predicted the importance of supply of skilled job opportunities (especially for migration originating in Northern America) and social networks (Latin America and the Caribbean, as well as Middle East and North Africa). The experts predicted that the most important drivers of migration to the EU would be economic, followed by governance-related factors, then demographic and societal. However, it is worth stressing that individual motivations and root causes to migrate are complex multitude of intertwining factors from dissatisfaction with their origin country's political regime to lifestyle choices, and will differ from person to person (cf. Bygnes and Flipo 2017; Ewers and Dicce 2018; Bijak and Czaika 2020).

Next, experts expected that the most popular destination for both skilled and low-skilled migrants would be the Western EU, followed by the Northern EU. Also, the Western EU and the Southern EU were expected to become the major recipients of low-skilled migrants, mainly from Africa and Latin America and the Caribbean. Meanwhile, non-EU Eastern Europe (including the Balkans) and Asia were predicted to become an important supply of both skilled and low-skilled migrants. A substantial amount of low-skilled migration was also expected to come from Africa and the Middle East.

### 5.1.2 Future policy trends

Further, over the next 10 years, experts expected that policymakers will seek to prioritise and support highly skilled international graduates, particularly through work visa schemes and finding ways to help them settle and integrate. As one expert noted, “not doing so could potentially lead to huge human capital losses”. Also, policies that were predicted to be implemented will be mostly based on a ‘needs must’ basis and tools such as quotas or shortage occupation lists may be prioritised for specific issues, e.g., needing care workers for ageing populations. This is in line with the policies sought under the New Pact on Migration and Asylum proposed by the EC (2020), with instruments such as the EU Blue Card, and Talent Partnerships with countries from the EU Neighbourhood, West Balkans, and in Africa. The experts also agreed that more liberal policies will not be high on the agenda in the next 10 years, with careful and restrictive migration policies being implemented.

When judging results of what in future will likely be prioritised by the EU policymakers, experts also ranked control and return policies as well as supporting higher education policies top. These views are broadly reflected and validated by wider migration policy literature that looks at current prevailing trends. For example, Cerna (2018) remarked on pivotal issues facing policymakers and drew attention to challenges such as ageing populations, the war for talent, attempts to attract and retain highly-skilled graduates, and also addressing employment shortages. Discourses and policies amongst Member States have typically been characterised by the need to attract highly skilled migrants while simultaneously needing to control low-skilled workers (Cerna and Czaika 2016).

The experts in the FUME Delphi also asserted that policy decisions are often politically motivated, for example, where policies are popular with voters or implemented on a ‘needs must’ basis. Indeed, significant increases in irregular migration flows and asylum applications between 2015-2017 have seen migration become “one of the central topics on the political agenda in many Member States” (Cerna and Czaika 2016, p.3). Increased efforts to manage the return of migrants with no legal right to stay, establish a more effective common asylum system, and control of external borders have been also seen at the EU level (European Commission 2019b). One key distinction in attempts to attract high-skilled immigrants is a preference for EU Member States to pursue either national policies (which vary from state to state) or the EU Blue Card scheme. The former are often favoured by countries such as Netherlands (approx. 7,000 high skilled migrants annually, 2012 to 2015) and Sweden (approx. 5,000), while Germany has favoured the latter with the largest quantity of 13,000 skilled migrants under the Blue Card system. The numbers of migrants also vary widely amongst EU Member States (Cerna 2018).

Migrant integration in labour markets is more complex when examined further. In a report commissioned by the European Parliament, Poptcheva and Stuchlik (2015) created a scoring system and assessed that when specifically examining the measure ‘labour market access’ of asylum seekers, EU countries display high heterogeneity in how good their asylum seeker policies are. In particular, Sweden came out best with a score of 98 out of 100. Sweden is notable for granting quick labour market access after asylum seekers lodged their applications, whilst France, Italy and Hungary received much lower scores. France, for instance, has a nine-month waiting period (Poptcheva and Stuchlik 2015) between submitting an asylum application and providing access to labour market. However, the unemployment rates of third country nationals in Sweden are some of the highest in the EU (28%), as well as in Spain (36%), despite having the best ‘labour market mobility scores’ (LMMS). Further, change over time can happen quickly with different trajectories taking place. Even traditionally more liberal countries such as the Netherlands have seen cut backs to initiatives to integrate unemployed individuals such as refugees into the labour market (Barslund et al. 2017), and also seen a fall in LMMS from 91 to 73 between 2010 and 2015, whilst Germany has increased 75 to 86 in the same period (Poptcheva and Stuchlik 2015). Martín et al. (2016a) noted that policymaking in the area of labour market integration of asylum seekers and even refugees could change dramatically, with legal frameworks often lagging behind the new policies. For example, several countries (Denmark, Germany, France, Italy) all implemented reforms in 2015-16 in response to the 2015 Migration Crisis (Martín et al. 2016b, Scipioni 2018).

The majority of experts also predicted that the gap between male and female migration will either be maintained or it would decrease in the next 10 years. Another half of the experts agreed that gender-balanced policy would be a priority in the EU. The experts also suggested that policies oriented towards inclusivity and integration, particularly of female migrants, as well as tackling issues related to low participation in the labour force by females and the concentration of female immigrants in low-skilled jobs should be taken into consideration. A gender-balanced policy aims at providing more care services or skill development opportunities, gender-based assessments and a labour market strategy that reduces occupational segregation and wage differences by gender. Such policies are in line with guidelines on gender-sensitive migration policies (OSCE 2009; Kofman 2014), where equality in employment opportunities is enabled

Despite the increasing numbers of female migrants and their educational attainment and skills, policy interventions to improve their positions in the labour market have been limited. Amongst working female migrants in the EU in 2017, 40% were over-qualified for their jobs, with many engaged in domestic work (IOM 2020). Nevertheless, the experts assessed this issue to be second to the last in importance (see Section 4.3.2). The Council of Europe gender equality strategy 2018-2023 has recognised the protecting the rights of migrant, refugee and asylum-seeking women and girls (Council of Europe 2018). This strategy emphasises the protection of women and girl migrants from violence and exploitation. The need for filling protection gaps for females and girls, especially related to disparities in how different EU Member States handle gender-related asylum claims, has been also expressed by the European Parliament (Shreeves 2016). Either case does not include a specific plan to ensure equal opportunities in the labour market and employment of male and female migrants

When asked about challenges in implementing the gender-related policies, experts pointed mainly to difficulties relating to nation states aligning national and supranational labour market-related regulation, for both highly skilled and low-skilled migrants, that also meet the diverse set of needs of individual Member States. Important obstacles also include the fact that those individuals that need such policies most are typically hard to reach, as well as traditional division of labour within migrant households.

The experts in the FUME Delphi clearly thought that policies considered more 'liberal' or 'progressive' were unlikely to be pursued by nation states (as seen by ranking policies such as family-friendly policy, and 'moving towards gender specific policies' as the least plausible ones in the next 10 years; see Section 4.4.1). However, the specific question (Section 4.2.2) showed somewhat broad agreement that there will be at least some gender-specific policies being prioritised. This is an important assessment, as Barslund et al. (2017), commenting on gender-based issues, argued that that EU "labour market integration programmes tailored to women's needs are generally insufficient" and often more commonly favoured in countries with more developed awareness of gender-based issues such as Germany, Austria and Denmark (idem.).

### 5.1.3 Impacts of the COVID-19 pandemic

Finally, experts predominantly agreed that the economic recovery from the COVID-19 pandemic would be a slow returning to the pre-pandemic growth levels, perhaps affected by wider global economic factors. The average probability for such scenario was 50%. Still, alternative scenarios of economic boom, as well as stagnation at zero growth, were also deemed possible (each with around 20% probability). The labour market will also be characterised by accelerated digitalisation ('smartification') of the economy and increase in flexible and remote working arrangements. These trends are in line with the pre-pandemic assessment of the potential impact of artificial intelligence and robotics on productivity and, more broadly, labour markets in the OECD countries (OECD 2019).

The experts also tended to agree that the pandemic might lead to migration policies that would prioritise highly skilled migrants (average probability 25%), and overall more restrictive policies (23%). However, three of the experts assigned very high probabilities to the scenario where the pandemic would have no impact on the migration policies, with the average probability of 20%. This assessment is in agreement with earlier expectations that migration policies will remain restrictive and/or tend towards skilled migration, regardless of the pandemic.

## 5.2 Limitations

It is important to acknowledge limitations of the approach adopted in this study. Firstly, the fact that the questionnaire covered five topic areas related to various aspects of migration made it challenging to recruit suitable experts with broad knowledge of those aspects and, simultaneously, being involved in migration policymaking. As one of the experts summarised, “giving precise answers about all EU Member States is a very difficult task, as their structures and policy-making are very different from each other. Each country has also path-dependency coming from past trends, which change very slowly.” Another expert suggested that an ideal study would involve a face-to-face interaction of experts and policymakers, which could help clarify ambiguities related to “major differences among EU Member States” with respect to migration regimes and policies. Further, policymakers are typically difficult to reach. It has been, therefore, important for the project to engage with its stakeholders since the inception to ensure that they can potentially be recruited and willing to participate in the study. Nevertheless, the aim of recruiting 10-15 participants was achieved.

Secondly, the first question in Round 1 of the survey proved to be relatively rich in information both to ‘take in’ and to provide the response. It perhaps would have been more inviting if one of the shorter questions was used at the beginning, and this may have led to a higher response rate. In Round 2, this question was simplified. Thirdly, the formulation and presentation of some of the questions could greatly benefit from visual and more interactive tools. While the questionnaire was relatively simple, specifically Question 1 could have benefitted from more intuitive drag-and-drop techniques; also questions eliciting probabilities could use a ‘voting’ system that ensures the probabilities sum up to one (this was implemented in Round 2). One of the experts commented that the ranking questions involved many categories and were particularly demanding

## 5.3 From expert opinion to future migration scenarios

The purpose of information elicited in the FUME Delphi survey is to inform other objectives of the FUME project. The results provide a selection of migration policy priorities that can be readily used to create migration narratives and, following from them, migration scenarios. For example, the expert assessment of the potential impact of the COVID-19 pandemic on migration policies can lead to creation of two narratives. The first such narrative can assume no direct effect on migration trends and, thus, relying on past trends and other socio-economic, demographic and environmental factors. The second narrative could then focus on more restrictive policies that limit the overall levels of migration, and focus on migration of skilled persons to the EU. These narratives can then be quantified and implemented in a projection model, while probabilities provided by experts can be used as weights for each of the scenarios.

The assessment of the migration drivers for migration corridors between regions of origin and four EU regions of destination can be coupled with results of the survey by de Jong and Boissonneault (2021 FUME Deliverable 3.3), who created global migration narratives based on six factors: demography, economy, environment, society, governance, and technology. These global narratives can be adjusted for each corridor based on experts’ assessment of the importance of articular drivers. These drivers can then be utilised in a migration predictive model that will generate migration scenarios under various assumed socio-economic pathways (O’Neill et al. 2017; Rikani and Schewe 2021).

Further, the qualitative decomposition (in terms of importance, not percentages) of migration by gender, skills, and region obtained in the survey can be used in two ways. First, it can provide information on this composition of migration before including the data in the model. For instance, plausible ranges of percentage shares of migration flows decomposed by gender, skills, and origin-destination regions can be constructed. Then, the projection model can be calibrated to match this expert-based decomposition where the data are inadequate, sparse, or missing entirely. A second approach could see using the expert-based percentage shares of migration flows translated into prior probability distributions for the composition of migration, and implemented in a probabilistic model that will update this information with available data to produce characteristics of migration with measures of uncertainty.



Finally, the elicited expert opinions can be used to assess migration scenarios produced by a predictive model (e.g. Rikani and Schewe 2021) or population projection model. One can determine which quantitative scenarios match experts' predictions on the importance of, e.g., particular regions sending and/or receiving skilled and low-skilled migrants, or gender balance. Predicted future migration trends can further be compared with past trends under various migration policy regimes and results discussed in light of the policy priorities expected by the experts.





*Picture: Craig Kydd/Unsplash.com*

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## 6. Acknowledgements

We gratefully acknowledge inputs from 13 experts, including<sup>10</sup>: Ummuhan Bardak, Laura Batalla, Martina Belmonte, Maciej Duszczyk, Paweł Kaczmarczyk, Sona Kalantaryan, Ferruccio Pastore, Anja Radjenovic, and Guido Tintori.

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<sup>10</sup> Only respondents who agreed to be named are listed here in alphabetical order.

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## 7. Appendix

### 7.1 Delphi questionnaire Round 1

#### Delphi Round 1 invitation



Dear Colleague,

I am writing to invite you to contribute to a project funded by the EU Horizon 2020 Programme, Future Migration Scenarios for Europe (FUME). The project aims to determine both current and future trends of migration by looking at the regional factors explaining migrant movement patterns by analysing regional and local circumstances that either attract migrants or 'push' potential migrants to move, and the possible future regional sociodemographic, economic and environmental challenges that may shape future migrant movement patterns in Europe. FUME is a consortium of nine academic institutions across Europe. It is headed by Professors Carsten Keßler and Henning Sten Hansen, Aalborg University Copenhagen. More details can be found at <https://futuremigration.eu/>.

This survey asks your opinion on several aspects of future migration to the European Union and migration policies. We are interested in your insights, from a policymaker's perspective, about drivers of migration, and plausible policy trends in terms of immigrants' skills, their gender, and the relationship between the two. We will use the results of this survey to inform migration narratives, and construct inputs to migration and projection models.

This format of this survey is a two-round Delphi survey. Now, in the first round, we collect your opinions about future migration processes and policies. In the next and final round, you will be provided with aggregated and fully anonymised results of the current questionnaire and we will ask you to revise your answers and answer subsequent questions. The survey is voluntary and anonymous.

We kindly ask you to complete and submit the survey no later than Wednesday 5 May 2021.

If you have any questions, do not hesitate to contact me ([a.wisniowski@manchester.ac.uk](mailto:a.wisniowski@manchester.ac.uk)).

I do hope that you will be able to accept this invitation and participate in the survey. We look forward to your responses.

Yours sincerely,  
Arkadiusz Wiśniowski.

Social Statistics Department  
University of Manchester  
Email: a.wisniowski@manchester.ac.uk.

### Delphi Survey on Future Migration in the EU – Round 1

This survey is designed to gather opinions from policymaker's perspective about key regional socio-economic drivers of migration, and plausible policy trends in terms of immigrants' skill level, their gender, and the relationship between the two aspects. Your opinions will be a valuable input to creating narratives regarding future migration scenarios. They will also inform projection models on future migration to the EU countries and, subsequently, their population.

The questionnaire has five sections, with questions about the following topics:

Part I. Drivers and motivations of immigration to the EU

Part II. Composition of migration by skill levels

Part III. Composition of migration by gender

Part IV. Policies on migration Part V. Impacts of the Covid-19 pandemic

We wish to stress that this survey is voluntary and completely anonymous, and no individual opinions will be cited at any point. Your details and the information you provide will not be shared with any third parties and be handled solely by the survey administrators, Dr Arkadiusz Wiśniowski and Ms Ji Hye Kim (both University of Manchester). The analytical purposes of the project will be achieved only in the aggregated results for the whole expert panel.

Please bear in mind there are no 'right' or 'wrong' answers, as we are interested in your opinions in your personal capacity as an expert. By completing the survey, you give us permission to use your answers in our project. However, you can withdraw from the survey at any time, in which case we will destroy any data that you might have provided.

Please note this survey does not support saving.

If you have any questions, please contact Arkadiusz Wiśniowski (a.wisniowski@manchester.ac.uk).

#### Contact Information

Please provide your information below. This information is collected **ONLY** to provide you with a copy of your answers and contact you for the second round of the survey. It will be available **only** to the administrators of this survey.

Name \_\_\_\_\_

E-mail address \_\_\_\_\_

#### Part I. Drivers and motivations of immigration to the EU

In this part, we would like to ask about the drivers and motivations of migration from various regions of the world to the EU. For the purpose of this survey, we combine the drivers and motivations of migration. We define drivers as external, structural causes of migration that could lead to trends in migration from one region to another region. We define motivations of migration as factors that trigger individual migration decisions.

**Question 1.** In the next 10 years, what drivers/motivations of migration from various regions to the EU will be most important? The table below presents a selection of drivers/motivations grouped into five categories.

**List of drivers/motivations:**

Demography & Education	Economy	Environment	Governance	Society
1. Population growth (e.g. a large young-age population, accelerated ageing)	5. Economic growth differences between origin and destination	7. Climate change (e.g. slower vs faster global warming)	8. Pro- vs anti-immigration policies (e.g. open vs restrictive to asylum seekers)	10. Social welfare systems
2. Supply of skilled job opportunities	6. Wage differences between origin and destination		9. Political stability and conflicts	11. Family reunification
3. Demand for low-skilled jobs 4. Demand for education				12. Social networks
				13. Multiculturalism and tolerance vs increased intolerance
				14. Gender equality

Others - please specify below what drivers/motivations not on the above list that you believe are often ignored but will be relevant in the next 10 years.

15. Other drivers/motivations:

\_\_\_\_\_

Please select the relevant numbers from the table to fill in the below table of origins (rows) and destinations (columns). Please indicate drivers/motivations such as "1,3,5".

- Feel free to provide answers only to some of the origin-destination corridors.

- The definitions of the EU regions are provided below the table.

Origins (rows):	Destinations:			
	Eastern EU	Northern EU	Southern EU	Western EU
Within the same region				
European countries outside the EU				
Asia				
Middle East and North Africa				
Sub-Saharan Africa				
Latin America and the Caribbean				
Northern America				
Other:				

If you wish so, please provide a brief justification to the above answer.

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The list below shows destination countries in each geographical region of the EU used in this survey.

Note: We removed the UK from the list as it left the EU as of 31 January 2020.

Eastern EU: Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia and Slovenia

Northern EU: Denmark, Finland, Sweden

Southern EU: Cyprus, Greece, Italy, Malta, Portugal, Spain

Western EU: Austria, Belgium, France, Germany, Ireland, Luxembourg, Netherlands

## Part II. Composition of migration by skill levels

**Question 2.** What paths of **skilled** internal migration within the European Union will be most prevailing in next 10 years? Please **check up to three** routes in the table (multiple answers per row are permitted).

\* Skilled migration indicates labour migration in high-skilled or medium-skilled jobs: IT, corporate managers, health professionals, scientists, and education.

Origins (rows):	Destinations:			
	Eastern EU	Northern EU	Southern EU	Western EU
Eastern EU				
Northern EU				
Southern EU				
Western EU				

**Question 3.** Which regions outside the EU will dominate in sending **skilled** immigrants to the different parts of the EU? Please **check up to three routes** in the table.

Origins (rows):	Destinations:			
	Eastern EU	Northern EU	Southern EU	Western EU
Asia				
Middle East and North Africa				
Sub-Saharan Africa				
Latin America and the Caribbean				
Northern America				
Balkans and Eastern Europe (non-EU)				
Other:				

**Question 4.** What paths of **low-skilled** internal migration within the European Union will be most prevailing in next 10 years? Please **check up to three** routes in the table.

\*low-skilled migration is defined as labour migration in low-skilled jobs: services or trades, domestic workers, and caregivers.

Origins (rows):	Destinations:			
	Eastern EU	Northern EU	Southern EU	Western EU
Eastern EU				
Northern EU				
Southern EU				
Western EU				

**Question 5.** Which regions of the world will dominate in sending **low-skilled** immigrants to the different parts of the EU? Please **check up to three** routes.

Origins (rows):	Destinations:			
	Eastern EU	Northern EU	Southern EU	Western EU
Asia				
Middle East and North Africa				
Sub-Saharan Africa				
Latin America and the Caribbean				
Northern America				
Balkans and Eastern Europe (non-EU)				
Other:				

### Part III. Composition of migration by gender

**Question 6.** During 2009-2018, the proportion of flows of male immigrants to the EU-27 member states was higher than female migrants (Males=54% vs Females=46%. Source: Eurostat database).

Compared with the above statistics, what gender balance do you expect in the number of immigrants in next 10 years? (choose one)

- Decreased gender gap
- Maintained gender gap
- Increased gender gap

Please provide a brief justification to the above answer.

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**Question 7.** The past and recent trends of male and female migration have been transformed in the EU and immigrants have experienced different challenges according to their gender. What gender issues regarding immigration to the EU do you think need to be considered by policymakers in the next 10 years? Please choose one or more from the answers below.

	Low labour force participation of female immigrants
	Female immigrants working below their skill-level
	Concentration of female immigrants in low-skilled jobs
	Occupational gender segregation in skilled jobs (e.g. more males in IT)
	Heavy caring responsibilities of female immigrants
	Other, please specify: _____

Please provide a brief justification to the above answer.

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#### Part IV. Policy trends on migration and education/human capital and gender

Currently, the EU immigration policy consists of three main parts: managing regular immigration, combating irregular immigration, and promoting integration. At the EU level, regular immigration of highly qualified persons is managed by the 'EU blue card' and by the special residence and work permits. Most of the other residence and work permit schemes follow national policies. For example, some countries use a quota system for certain jobs (Southern EU), labour market test (Germany) and provide shortage occupation list (France, Spain), while some countries have a liberalised labour immigration policy (Ireland, Sweden). Next, the EU tackles irregular immigration by applying the Common European Asylum System and an effective return measure. Lastly, integration policy includes the support for family reunification, which relies more on national policies (e.g. family-friendly migration policy, invitation scheme).

**Question 8.** In your opinion, what policies will be priorities for policymakers in the EU in the next 10 years?

	Extending the EU Blue Card system
	Extending an immigration quota system
	Providing a shortage occupation list
	Liberalising labour migration policies
	Introduction of a point-based system
	Supporting family-friendly migration policies
	Moving towards more gender-specific migration policy
	Supporting work visas for higher-education international graduates
	Other, please specify: _____

What challenges do you expect in implementing those selected policies?

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If you wish so, please provide a brief justification for the above selection.

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**Question 9.** How much do you agree that a gender-balanced immigration policy will be important for the EU policymakers? (choose one option)

**Gender issues** in migration include an imbalance in the number of immigrants by gender, occupational sex segregation, and female immigrants' low economic participation.

**Gender-based immigration policies** might address those issues by providing more care services or skill development opportunities, gender-based assessments and a labour market strategy that reduces occupational segregation and wage differences by gender.

	Strongly disagree
	Disagree
	Neither agree nor disagree
	Agree
	Strongly agree

Please briefly specify any challenges to gender-specific policies.

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#### Part V. The effect of the Covid-19 pandemic

We would like to ask you about scenarios related to the Covid-19 pandemic and their plausibility.

**Question 10.** How will the COVID-19 pandemic affect the economic growth in the EU in the next **10 years**?

Please specify a probability for each of the scenarios making sure that they sum up to 100%.

	percentage
Slow recovery to pre-pandemic growth levels	
Fast recovery and economic boom	
Stagnation at close-to-zero growth	
Persistent negative growth	
Other (please specify): _____	

If you wish so, please provide a brief justification or comment to the above answers.

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**Question 11.** How will the COVID-19 pandemic affect the migration policies of the EU countries? Please specify a probability for each of the scenarios making sure that they sum up to 100%.

	percentage
No direct effect of Covid-19 on migration policies	
More open migration policies	
Policies selective towards high-skilled migrants	
Policies selective towards low-skilled migrants	
Policies restrictive to all groups of migrants	
Promoting migration within the EU	

If you wish so, please provide a brief justification or comment to the above answers.

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**Question 12.** Aside from the impacts on economic growth, what will be other effects of the pandemic in the EU in the next **10 years**?

	High and persistent unemployment
	Reduction of welfare states
	Increasing inequalities between the rich and poor
	Increasing development gap amongst the EU Member States
	Localisation and de-globalisation
	Accelerated digitalisation ("smartification") of economies
	More flexible and remote working arrangements
	Increased efficiency and productivity
	Other, please specify: _____

If you wish so, please provide a brief justification or comment to the above answers.

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### Final remarks

**Question 13.** Provide any comments about this survey or additional justifications to your answers.

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Thank you for taking the time to complete this survey!

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