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Labour Markets Performance and Migration Flows in Arab Mediterranean Countries: Determinants and Effects

Volume 1

Final Report & Thematic Background Papers

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European Commission
Directorate-General for Economic and Financial Affairs

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Volume 1
Final Report & Thematic Background Papers

EUROPEAN ECONOMY Occasional Papers No. 60

STUDY

LABOUR MARKETS PERFORMANCE AND MIGRATION FLOWS IN ARAB MEDITERRANEAN COUNTRIES: DETERMINANTS AND EFFECTS

The European University Institute (RSCAS) was selected by the European Commission to carry out a Study on "Labour Markets Performance and Migration Flows in Arab Mediterranean Countries: Determinants and Effects" (Nº ECFIN/D/2008/036).

Co-financed by the European Commission (DG Economic and Financial Affairs and DG Employment)

Scientific Director: Philippe Fargues

Project Coordinator: Iván Martín

Objectives

The objectives of the Study are two-fold:

- to analyze the key labour market determinants of migration flows from selected Arab Mediterranean Countries (Algeria, Egypt, Jordan, Lebanon, Morocco, Syria, Tunisia and the Occupied Palestinian Territories), with a particular emphasis on demographic pressures, wage differentials and relative income disparities with the EU, employment policies, labour market flexibility and unemployment rates; this analysis includes the impact of migration on the labour markets of Arab Mediterranean Country (AMCs) labour markets;
- to propose a series of specific recommendations to improve the design of the EU's migration policies towards AMCs and policy options available to them for the management of mismatches between labour supply and demand.

Team of Experts for the Study

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Background papers

To cope with the ample regional diversity and the variety of issues addressed in the Study, 10 background papers were commissioned to feed the Study:

8 national background papers on labour markets performance and migration flows in Arab Mediterranean Countries. A country-by-country analysis (Algeria, Egypt, Jordan, Lebanon, Morocco, Syria, Tunisia and the Occupied Palestinian Territories), following a common questionnaire, of the migration trends in the AMCs, with particular emphasis on key labour market factors such as demographics, labour costs, skills composition, effectiveness and efficiency of current employment policies, recent labour market reforms, contractual arrangements and size of the informal sector.

2 thematic background papers on “EU Migration Policy towards AMCs and its Impact on their Labour Markets” and “The Impact of Migration on AMC Labour Markets: A Bibliographical Review”.

Activities

The Study was carried out between January and October 2009. The main activities were the following:

- Methodological Workshop. Florence, 28 January 2009. A one-day co-ordination workshop focused on methodology and data issues for the National Background Papers.
- Validation Workshop. Montecatini Terme, 26-27 March 2009. A two-day workshop to discuss and validate National and Thematic Background Papers and to undertake a regional comparative analysis of labour markets performance and migration flows in AMCs.
- Policy-Makers and Experts Conference on “Labour Markets and Migration Flows in Arab Mediterranean Countries”. Cairo, 11-12 October 2009. Jointly organised by the EUI, Cairo University and the European Commission. A two-day conference for policy makers, labour market specialists and experts on migration issues from the EU and the AMCs to present and discuss the final Study and proposals and recommendations to improve the design of the EU’s migration policies towards AMCs and policy options available to them for the management of mismatches between labour supply and demand.

For more information on the Study

www.eui.eu/DepartmentsAndCentres/RobertSchumanCentre/Research/Migration/LabourMarketsMigration/Index.aspx

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CHAPTER I – Final Report

Labour Markets Performance and Migration Flows in ARAB MEDITERRANEAN COUNTRIES: A Regional Perspective

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* This Final Report is based to a large extent on the contents of the ten Thematic and National Background Papers commissioned for the Study; in some cases, entire paragraphs have been taken from them. For titles and authors, see Bibliographic References at the end of the Report. The author is grateful for the comments received on former versions of this report from Philippe Fargues as Scientific Director of the Study, Alessandra Venturini and Francesca Marchetta of the European University Institute, Umuhan Bardak of the European Training Foundation and Inmaculada Montero-Luque, Marga Peeters, Thorsten Christen, Gerhard Krause, Francesco Luciani and Chiara Capello of the European Commission. He also wishes to thank all the participants in the final conference held in Cairo on October 11-12, in particular Ibrahim Awad of the ILO, Jean-Christophe Dumont of the OECD, Ahmed Ghoneim of Cairo University, and Gemma Aubarell of the Anna Lindh Foundation for the Dialogue between Cultures, who acted as discussant of this report.

Executive Summary

The main objective of this Study is to analyze the key labour market determinants of migration flows from selected Arab Mediterranean Countries (Algeria, Egypt, Jordan, Lebanon, Morocco, Syria, Tunisia and the Occupied Palestinian Territories) and the impact of outward migration on the labour markets of Arab Mediterranean Countries (AMCs). This has been done mainly on the basis of the evidence and analysis produced by the two Thematic Background Papers and the 8 National Background Papers commissioned for the Study. In turn, the National Background Papers are deliberately based on national statistical data sources: this makes comparability less straightforward, but has the merit of using original data available at the local level, where they are collected and generated.

The main findings of the Study can be summarized as follows:

INSUFFICIENT DATA AND RESEARCH

- **Scarce and problematic DATA**

  Despite recent improvements in the availability and the quality of employment and migration statistics for AMCs, any serious analysis of labour markets and migration in AMCs is seriously hampered by a widespread scarcity of data at the national level, the inaccessibility, unreliability and inconsistency of available data and the difficulty of comparing data from across the region. This Study is based on best available national data collected in National Background Papers according to a common template, but still all tables and data included in it should be subject to this major caveat.

- **INSUFFICIENT RESEARCH on the interaction between labour and migration in the region**

  As the literature review produced for this Study underlines, there is a shortage of research on labour and migration in AMCs, and even more so on their interaction. The theoretical literature, indeed, comes mainly from other regions, and even this is scarce and fragmentary in some respects, for instance the impact of migration on labour markets in countries of origin. So a first step in facing the huge challenge of employment in AMCs and the complex issue of migration in the region is to know more about these issues, their magnitude and characteristics. This Study makes a contribution in this direction by systematizing the existent literature on the impact of migration on labour market and providing a possible analytical framework that could guide future research on this topic.

THE CHALLENGES OF EMPLOYMENT

- **Employment in AMCs poses a CRUCIAL CHALLENGE for the region – and for Europe – in the next 10 to 15 years**

  AMCs are, taken together, the world region with arguably the most daunting employment challenge, at least in relative terms. Official labour participation rates there are the lowest in the world (below 46% of working age population, compared to the world average of 61.2%), a consequence this of the lowest female participation rate in the world (below 25% as compared to a 42% world average). Despite this average unemployment rates (almost 15% of the labour force) are higher than in any other region with the exception of Sub-Saharan Africa. And the demographic prospects for the coming ten to fifteen years make all foreseeable scenarios even bleaker.

- **15 MILLION NEW JOBS NEED TO BE CREATED BEFORE 2020, between 1/3 and 2/3 more jobs per year than have been created during the last five years of high economic growth**

  Adding together the projected needs for new jobs calculated for this Study under conservative assumptions on the basis of national statistical sources, the AMCs will need more than 1,500,000 additional jobs a year over the coming 10 years in order to provide employment opportunities for new labour market entrants and to keep the (already very high) number of unemployed unchanged, and this under the (hardly realistic) assumption that there will be constant labour participation rates. So the 15 million new jobs which are needed until 2020 would mean an increase of 30% in relation to the current level of total employment in those countries, and would amount to between 1/3 and 2/3 more jobs per year than those that have been created over the last five years in the region, a period, note, of marked economic prosperity. And the foreseeable decline of employment elasticity to growth (which, with an 0.9 average for the region, stands at a level three times higher than the world average) means that the economic growth rates needed to achieve this job creation goal will have to be substantially higher than in the past.

- **IMMEDIATE ACTION IS NEEDED…because the *STATUS QUO* in terms of employment risks causing permanent damage to the development prospects of those countries**

  Thus in terms of employment policies and development models the *status quo* risks putting strains on the social fabric through tensions in the labour market, greatly affecting social cohesion and stability in the region – and hence adding to migratory pressures. The prevailing unemployment rates for young people also risk causing permanent damage to the development prospects of these countries, to the extent that young people will be discouraged from engaging in the labour market and will see their qualifications stagnate or deteriorate as the informal economy spreads. This would have long-lasting consequences for the development of human capital and productivity and for the functioning of a regulated market economy. This requires immediate policy action by AMCs – and by the EU, which would suffer from any instability in the region.

- **AMC WOMEN are largely absent from the labour markets**

  Labour participation rates in AMCs are the lowest in the world: only one in four of their 180 million inhabitants actually have a job, giving a 3 to 1 dependency ratio. The main explanatory factor for this is the lowest labour participation rate of women in the world: only one in four working-age women are in the labour markets, and an average of 20% of these are unemployed. This means a de facto exclusion of 85% of working age women in the region from the labour markets. The loss of educational investment in women that this entails is enormous, not to mention the constraint this imposes on their right to economic and social emancipation.

  On the other hand, if the participation rate of women increases over the next years to catch up to the world average (as is happening already, though at a slow pace), an increase of 5 percentage points on the labour participation rate of women in the next ten years, consistent with the increasing trend observed in the last decade, would mean that the number of jobs to be created in AMCs to cope with the expansion of the labour force would increase by more than 240,000 a year for the 8 countries under consideration.

- **Despite low labour participation, UNEMPLOYMENT is already at socially unsustainable levels, in particular for youth and women**

  Although official unemployment figures in the region are arguably underestimated in many respects and often show striking discrepancies, the number of the unemployed exceeded 7 million by 2008, almost 15% of the labour force (which is in turn under-registered as a consequence of the very low participation rate of women). 80% are young first-time job seekers. Female unemployment averages over 20% in the region, and youth unemployment often exceeds the 20% mark or 30% for young women. Paradoxically, in all AMCs unemployment increase among workers with higher qualifications, and graduate unemployment is a widespread phenomenon. This involves a dramatic loss of educational investment and has attracted the attention of analysts and policy-makers alike. But one should not forget that university graduates are fewer than 15% on average of labour force in AMCs, and only slightly more than 1 out of the 7 million unemployed. This means that, in absolute terms, the main employment challenge in AMCs is not related to graduate unemployed, but to workers with no education or only primary education.

- **The HIGH ECONOMIC GROWTH RATES achieved by most AMCs over the last six years have not benefited all workers alike…**

  In the six years since 2002 economies in the region followed a high growth path (in the 5-6.5% range on average), which led to an average annual job creation rate of 4.5%, enough to offset the labour force growth rate of 3.6% a year on average (for a working age population growth of 2.8%). So global unemployment rates have been reduced in all countries during this period of high growth rates, but average wages have not followed suit and the categories of workers most affected by unemployment or informal employment (women and youth, in particular) have hardly benefited from this trend. The rate of precariousness of employment increased in many AMCs.

- **...and the GLOBAL ECONOMIC CRISIS could turn the job crisis into a major destabilising force**

  The present economic crisis is intensifying a series of labour market and education challenges that the Arab Mediterranean Countries have not solved in the last 20 years of relative macroeconomic discipline and which have hardly even been tackled in the last six years of high growth. As migration chances diminish as a consequence of the economic downturn and the return of temporary migrants, in particular from Gulf countries, becomes more notable the long-lasting job crisis the region is suffering might intensify in terms of its social destabilizing potential and end up causing major damage to the development prospects of this region. The situation is compounded by the lack of unemployment insurance schemes in most countries in the region, or a lack of coverage in existing schemes. In any case, the link between migration and development should be revisited in the light of the crisis.

- **This is making INFORMAL EMPLOYMENT a solution of last resort for increasing numbers in AMCs…**

  Informal employment already accounts for between 45% and 55% of total non-agricultural employment in the region. This means that the chances of finding formal, decent jobs are very low. Informal employment depresses wages, hampers the development of human capital and introduces major distortions into the functioning of the goods and services markets in AMCs, including the operations of foreign investors and the prevalence of low productivity jobs. The extent of informal employment in AMCs has become the main objective symptom of labour market distortions in the region. However, we still know too little about the working of the informal economy and its impact on economic activity and development prospects in the region, not to mention its interaction with international migration.

- **…so that MIGRATION remains the first choice for many workers (in particular youths)**

  The higher salaries and the job security of public administration jobs still exert a powerful attraction on young workers in AMCs, in particular graduates, in a region where public sector employment is already the highest in the world (over a third of all jobs are in the State sector). But the implicit social contract guaranteeing a State job to all graduates that prevailed until the 1980s has been terminated, and the State no longer provides realistic employment prospects. Thus, short of prospects for a decent job in the private or in the State sector, migration has become the employment solution of choice. Indeed, migration prospects, in some cases (e.g. Lebanon) combined with the high cost of living in urban areas, translates into a high reservation wage (i.e. the minimum income for which a worker is ready to work) which, in turn, creates severe distortions in some AMC labour markets.

- **But SKILLS MISMATCHES in the labour markets and the poor performance of education systems remain the main problem**

  However, the main problem for the labour markets of the region is not so much the issue of the growing labour force and the concomitant need to create a substantial number of jobs. Rather it is the structural demand-supply mismatches in the labour market, in particular the discrepancy between the outcome of the education system and the skills required by the private sector.

EMPLOYMENT POLICIES

AMCs are ill equipped in public policies terms to face these challenges.

- **LABOUR REGULATIONS are rigid…and poorly implemented**

  Labour regulations in the formal sector are equivalent to those prevailing in developed OECD countries (in terms of hiring and firing regulations, working hours, benefits…). Social insurance schemes are costly (23% of wages on average) and inefficiently managed. However, the prevalence of informal employment and the poor implementation of applicable rules lead to a high level of de facto flexibility in labour markets, but in the worst sense, i.e., curtailing the rights of workers and the prospects of getting a decent job. So labour regulations in AMCs impose a high degree of rigidity and costs but, paradoxically, provide only a low level of protection for the majority of workers. As a consequence, segmentation of labour markets along gender, education and public/private and formal/informal lines is paramount in the region. This adds to migration pressures.

- **Current EMPLOYMENT POLICIES are not equal to the magnitude of the challenge and poorly implemented and evaluated**

  In many countries there are hardly any recognisable national employment strategies which identify labour market challenges and try to address them in a consistent manner. Active labour market policies are often used as substitutes for comprehensive employment policies: they are expensive but suffer from poor targeting (they tend to favour mainly the graduate unemployed), dispersion, overlapping and inadequate evaluation.

  However, there seems to have been some positive developments in this field in the last few months. In contrast to the typical lack of labour market regulation reforms in the region, the definition of new national employment policies in several AMCs in the last year or so (Jordan, Algeria, Tunisia) nurtures some hope and offer obvious points of contact for further cooperation with the European Union.

- **REAL WAGES are at a very low level in comparison to the EU and the trend in most AMCs is for further divergence from EU rates….**

  Real wages in AMCs stand on average at less than 1/6 of EU net wages (in purchasing power parity). In the last few years, instead of converging towards EU levels, in Morocco, Algeria (where a negative average yearly decrease of PPP wages at -1.7% in 1996-2006 was registered, in contrast with the 3% annual increase in the EU-15), Tunisia, Syria and Jordan there has been a slight divergence of wage levels in relation to those of the EU. As for minimum wages, they are often too low to maintain a typical family and too high to ensure the international competitiveness of national industry.

- **…and the low PRODUCTIVITY prevailing in AMCs makes it very difficult to improve economic prospects for the coming years**

  In a context of trade liberalization (and hence the imperative of competitiveness) and relative macroeconomic discipline, the convergence of wages depends, to a large extent, on productivity increases. But this is a very difficult path for countries suffering from inefficient education systems and a widespread informal economy, as the stagnation of aggregate productivity in AMCs over the last few years demonstrate. The current development model does not seem to guarantee the level of job creation required by demographic trends in AMCs.

MIGRATION AND LABOUR MARKETS

- **AMCS HAVE A LONG TRADITION OF LABOUR MIGRATION, AND A LARGE MIGRATION POTENTIAL**

  There are more than 10 million AMC citizens resident in third countries (see Table 4.2.1). This amounts to more than 8% of their working age population, with higher average levels of labour participation, employment and qualifications than those prevailing in the national labour markets. This is a very substantial share of the AMC labour force, both in quantitative and qualitative terms, even if in Mashreq countries, in contrast to Maghreb countries, women have largely abstained from migrating so far.

  If this migration ratio is maintained through sustained migration, the growth of working age population in AMCs would translate into an increased yearly migration flow of 200,000 persons between 2010 and 2020 (i.e., 2 million more new AMC migrants over the period; see Figure 1.1.1). But there is strong evidence for increasing migration rates across AMCs in the last decade (23% in Tunisia, close to 100% in Lebanon), so that this flow could easily triple to 6 million more new migrants over the next ten years if migration rates reach, in a way that is consistent with recent evidence, a level of 24%. These figures could be easily multiplied if current restraints on the labour participation – and migration – of women were eased.

- **This makes economic development of AMCs PARTICULARLY DEPENDENT ON REMITTANCES**

  As a consequence, several AMCs are heavily dependent on remittances: Lebanon (22.8% of GDP) and Jordan (20.3%) are the AMCs where money transfers from migrant workers represent the highest share in their economies; in absolute terms, Egypt, Morocco and Lebanon are amongst the top 20 remittance recipient countries in the world. This has, of course, major macro-economic consequences, but also affects the behaviour of people in the labour market, particularly in regard to education and labour participation: it may increase education investment given the prospects for migration and the skill premium abroad (there is evidence of this in countries like Lebanon); and reduce incentives to work (although the low participation rate of women seem to have mainly cultural as opposed to economic roots). The current global economic crisis makes AMCs very vulnerable to a reduction of remittance flows.

- **IMMIGRANTS already play a key and increasing role in AMC labour markets**

  The labour markets of AMCs are increasingly shaped by the presence and the inflow of labour immigrants. AMCs host more than 1 million legal immigrants of working age (2% of current employment), and an undetermined level of irregular or unregistered labour migrants (which could exceed 2 million). On the other hand, AMCs are one of the regions in the world with the largest presence of refugees (a total of close to 6 million); so that in several AMCs, such as Syria and Lebanon, geopolitical developments are a key factor in understanding labour market dynamics. Indeed, in some AMCs immigration has become a structural feature of labour markets. This is particularly the case in the smaller Mashreq countries such as Lebanon and Jordan (especially construction, agriculture and domestic service workers), but increasingly too in Maghreb countries (with migrants from Sub-Saharan Africa). In the context of high informal employment, this poses an additional challenge in providing decent work opportunities for local unskilled labour, increasing migration pressures for them as well.

- **In this context, there is a noteworthy deficit of explicit OUTWARD MIGRATION POLICIES in AMCs**

  Despite an increasing interest in migration policy instruments and the recent creation of migration management institutions, it is surprising that most AMCs do not yet have an articulate and explicit outward migration policy, or have only a passive one promoting migration as a way of reducing labour supply, easing social tensions and generating revenues. Morocco is the only exception here and then only to a certain extent. In all AMCs there is much scope then for improving migration policy making and implementation.

- **As for MIGRATION PRESSURES, there is evidence that they are, to a large extent, related to wage and income differentials rather than to unemployment levels**

  The lack of economic opportunities and prospects in AMCs are major drivers of migration pressures: according to different country-level surveys in Palestine, Lebanon, Algeria, Morocco and Tunisia reported in National Background Papers and in Fargues 2009 (pp. 20-21), more than half of AMC youth express the desire to emigrate. In this context, there is some evidence that the main economic driver of migration is the level of wage differentials (which are indeed increasing in most AMCs in relation to the average EU gross annual earnings), rather than unemployment. This has major policy implications; it means that migration pressures will remain high even after the current working age population boom is over, even if the quality of the education system and hence of the worker's skills is substantially improved and even if current unemployment levels are reduced.

- **Evidence of BRAIN DRAIN is inconclusive, but it could be a factor in certain AMCs**

  Although the level of graduate unemployment is high across AMCs, the high rate of graduate migration (9% on average, doubling the world average, and exceeding 35% in Lebanon and 17% in Morocco, see Table 5.2.1) might pose a problem of loss in human capital for those countries. In some countries there is evidence that skilled migration is causing shortages of qualified labour in certain sectors (Morocco, Tunisia) or a drain on scarce qualified resources (Lebanon). In other countries, including Egypt and Jordan where more than 50% of their migrants are highly-skilled, the migration of skilled labour seems to ease the graduate unemployment problem rather than causing a loss of resources, i.e. skilled migration is preventing the brain waste caused by youth graduate unemployment and female inactivity. But in any case migration brings about a loss of valuable investments on education that needs to be addressed.

- **In any case, there is strong evidence that SKILLED MIGRATION (i.e. graduate migrants) from AMCs is directed mainly towards the Gulf and the US, rather than towards the EU**

  Wages seem to play the most important role in this respect, but migration policies also have an impact. This has important implications for the current EU drive to create instruments (such as the recently approved Blue Card) to attract a higher number of skilled immigrants to EU labour markets.

- **As for the EFFECTS OF OUTWARD MIGRATION ON LABOUR MARKETS according to the literature, they can be summarized in the following table**

Synthetic table of the effects of outward migration on labour markets

Migration stages / Effects on labour markets			Prospect to migrate	Actual migration (permanent; temporary)	Remittances	Return migration
Supply side	Factor Endowments	Labour supply (L)	-	-	-	+
		Skills supply (H) (brain drain/gain)	+	-	+	+
		Capital supply (K)	=	=	+	+
	Behaviour	Education (H) (skills acquisition)	+	=	+	+
		Labour participation (L)	-	=	-	+
		Wages (reservation wages)	+	+	+	+
Demand side	Consumption patterns	Labour demand	-	+	+	+
	Investments, entrepreneurial activities	Labour demand (K)	-	-	+	+
Structure	Informal employment		=	=	+	=

L = Labour supply; K = Capital; H = Human Capital

However, empirical evidence in AMCs shows that, apart from easing the demographic pressure on the labour markets of AMCs, migration exerts little or no effect on the female participation rates, and that brain drain does not represent a serious threat for the development of most AMCs. Along the same lines, the demand stimulus derived from remittances has a limited job-creation effect. In contrast, return migration can have a more relevant long-lasting effect on employment opportunities.

- **In AMCs, REMITTANCES do not seem to affect labour markets to a large extent**

  Neither National Background Papers nor the literature provide evidence of high remittance levels in AMCs affecting the labour participation rate of women (which is determined rather by cultural factors) or average wages (which are very inelastic due to the abundance of labour, the prevalence of informal employment and the high levels of unemployment). However, remittances or the prospect of migration do seem to have an impact on reservation wages, thus increasing the "equilibrium" level of unemployment, in particular for graduates. This seems to be particularly the case in Lebanon and Jordan and to a lesser extent in Morocco.

- **RETURN MIGRATION, in contrast, has very positive effects on labour markets of countries of origin, but so far its size is marginal in most AMCs**

  Return migrants show a higher propensity for entrepreneurial activities, in part due to skills acquisition and in part as a consequence of capital accumulation, and earn higher wages than non-migrants (implying higher levels of productivity). However, so far return migration has been relatively marginal in size in all AMCs, if one puts aside the case of Egypt and of forced return migration to Jordan, Egypt, Lebanon and Tunisia, in particular after 1991 due to the first the Gulf war, which put significant pressures on these countries' labour markets. Indeed, so far the propensity to return depends to a large extent on destination and not origin countries. In this context, circular migration and facilitating the voluntary return of migrants becomes a win-win strategy for the migration policies of both destination countries and countries of origin.

- **MIGRATION ALONE WILL NOT SOLVE THE LABOUR MARKET CHALLENGES of AMCs**

  The magnitude of the employment challenge in AMCs in the coming 10 to 15 years is such that there is no realistic scenario which migration could 'solve'. However, many of the policy actions and institutional reforms required to become more competitive in the global labour supply market—enhanced education and vocational training systems, increased labour participation for women—correspond with those needed to foster private sector job creation and labour productivity growth at home.

- **But the DEMOGRAPHIC AND SKILLS PROFILE OF THE EU AND AMCs OFFER OPPORTUNITIES FOR WIN-WIN MATCHING STRATEGIES between EU labour demand and AMC labour supply**

  In the coming two decades, AMCs will provide a pool of increasingly educated young workers in which the EU labour markets could invest its increasing demand for medium- and high-skilled migrant workers. This matching would be mutually beneficial and partially dampen the main factor for social instability in the region, and hence have positive externalities for Europe by preventing spill-over into neighbouring European countries. To this extent, investment in the skill development of AMC labour forces has the characteristics of a public good for Europe.

  However, this synergy is contingent upon an effective and immediate skills upgrading of labour forces in the AMCs (this should become a priority for EU-AMC economic cooperation) and the setting up of a friendly climate for legal migration in the EU, effectively attracting skilled migrants. The current instruments of EU migration policy, including the recently approved Blue Card, do not seem to provide for this. This notwithstanding the new Euro-Mediterranean regional dynamics put in place through the first Euro-Mediterranean Ministerial Conferences on migration and employment could eventually give rise to a comprehensive region-wide strategy on labour migration – provided that the appropriate policy tools and effective implementation plans are adopted.

On the basis of these findings, the following proposals for action and policy recommendations submitted for consideration in Section 7 are summarized:

PROPOSALS FOR ACTION AND POLICY RECOMMENDATIONS FROM THE STUDY

- **DATA AND FURTHER RESEARCH**

  Given the difficulties of compiling basic information on labour markets and migration in AMCs and the lack of specific research focused on evidence from the region, the research agenda on labour markets and migration in AMCs should take a multilevel approach. This might include, in this sequence:

  1. **A region-wide program to *produce* a complete set of standardised statistics on labour markets and migration** based on national statistical sources using the same methodologies throughout the region so as to allow comparability. This programme would necessarily involve national State statistical services and might be designed and implemented in the framework of the current Medstat III regional programme.
  2. **A project to develop a set of complete statistics on labour and migration at the sub-regional level in one or two pilot countries.** The template of statistics might be the same as in 1). The project should provide resources to carry out specific region-level surveys when needed.
  3. **A wide-ranging study to test to what extent research and theories on migration flows and labour markets developed on evidence from other regions apply to AMCs**. This scientific testing of theories and hypothesis would be based on the above-mentioned sets of pan-AMC and sub-regional labour markets and migration data. Figure 5.1.1 (reproduced above) offers a possible matrix of research questions to guide this research.
  4. **An inventory of migration policies implemented throughout the region (both in the EU and in AMCs), with a scientific assessment of their working and their impact** through appropriate indicators and methodologies. This could serve as a basis for the transfer of best practices.
  5. **A region-wide study on informal employment in AMCs** to make up for the lack of knowledge on the informal economy and informal employment in AMCs, its working and how it interrelates with the formal labour market and international (irregular) migration.
  6. **A comprehensive study on the magnitude and characteristics of inter-Arab migration**, in particular AMC migration patterns to the Gulf countries and Libya.

- **AMC ECONOMIC AND SOCIAL POLICIES**

  There seems to be a reasonably broad consensus on the national AMC policies needed to face the challenge of employment. Some basic guidelines for action and policies are the following:

  1. **Upgrading of national education and vocational education and training systems**. Quality of education at all levels, orientation to labour market needs and the employability of youths and women should be at the centre of this strategy.

  2. **Putting employment creation and productivity increase at the centre of all economic and industrial policies**, promoting labour intensive activities and investments, but also high added value industries.

  3. **Integration and coordination of public policies in four areas is required to render effective the national strategies to enhance creation of good quality jobs:** macroeconomic and fiscal policies, public investment and private sector promotion policies; education and training policies; social protection policies; and labour regulation

policies. This coordination should take on an institutional shape, i.e. formal exchange and consultation between the respective competent Ministries at the national level.

4. **Extensive employment policy assessments** should be carried out in every country, and monitoring and evaluation capacities be substantially strengthened. Active labour market policies should be systematically assessed and redesigned to achieve employment creation objectives.
5. **In-depth study on the obstacles to the labour market participation of women and the formulation of a strategy to remove these obstacles** (such as public transportation and child caring facilities, for instance).
6. **Creating incentives to private sector firms to hire new graduates and women and also training for workers** through tax rebates.
7. **Creating a set of incentives for transforming informal employment into formal employment** (this could include a reduction of current high social security contributions).
8. **Establishment of social protection systems guaranteeing universal coverage**, including unemployment insurance schemes. Emphasis should be put on the protection of workers rather than the protection of jobs.

- **EU MIGRATION POLICIES**

AMCs need to undertake structural reforms to upgrade their economic policies in order to create an encouraging investment and business climate to attract foreign direct investment and foster the private sector. The EU then should upgrade the mix of policies increasing its competitiveness for attracting the production factor it will need in the coming decades – labour. A multilevel strategy to address this policy reform should include the following measures:

1. **The creation of legal schemes allowing for permanent legal migration to the UE, and not only for skilled migrants.**
2. **The design and implementation of EU-wide schemes allowing for circular and temporary migration** from AMCs and leading to true mobility partnerships, but also liberalizing service provision through the temporary movement of labour from AMCs (Mode 4 of the General Agreement on Trade on Services).
3. **To improve the comprehensiveness of the new "Global Approach to Migration"** adopted in 2005 and to remedy the gaps left by its instruments, it is important to:
    - Promote ratification by all EU countries of the UN Convention on Migrant Rights;
    - Enpower institutions and legal channels facilitating the recruitment of workers on both sides of the Mediterranean;
    - Draw the consequences of the existence of a Single Market for labour and devise work permits for labour immigrants valid throughout the EU;
    - Encourage visa and institutional policies that favour temporary patterns of migration and mobility; this should include the introduction of multiple-entry, multi-country visas and work permits;
    - Refine temporary migration programs and make them more attractive by guaranteeing social rights and the portability of benefits;

   - Improve the recognition of educational degrees in the EU and create more institutional and legal synergies between academic institutions on either side of the Mediterranean;
   - Remove obstacles to family reunification, which may act as a factor for human capital development.

- **EU-AMC COOPERATION**

  The European Neighbourhood Policy and the new sectoral dynamics launched at the Euro-Mediterranean multilateral level by the first Euro-Mediterranean Conferences on Migration (November 2007) and Labour and Employment (November 2008) provide an enabling framework to implement the "Global Approach to Migration" not only as a unilateral EU strategy, but as a cooperative framework for true co-development.

  To make progress in this direction, some initiatives could be undertaken:

  1. **The launching of national projects in each AMC to support public employment services, to review and to modernize employment policies** in the framework of the Neighbourhood Action Plans for 2011-2013 currently being negotiated with AMCs. These projects should include:
     - a review of national employment policies with a common template;
     - technical assistance on employment policy-making, as well as capacity-building in managing labour markets, and in the review, assessment and upgrading of active labour market policies;
     - institutional strengthening of Employment Ministries and their policy-making capabilities, as well as of national employment agencies as labour market intermediaries;
     - promotion of youth and female employment and the gearing of public employment services to promote such employment.
  2. **Quick implementation of a regional Framework for Actions on Employment as agreed in the First Euro-Mediterranean Conference of Work and Employment Ministers in 2008**; as seen with the European Employment Strategy, scope for regional co-operation in this field is great. Common objectives and a common policy-making framework, with a region-wide system of multilateral progress monitoring by each partner, could provide the right incentives to share experiences and best practices, adopt effective policies and follow-up implementation from a technical perspective.
  3. **A region-wide review of national migration policies by AMCs and EU migration policy instruments** in relation to AMCs in order to identify the institutional framework conducive to a synergy – and at a later stage a joint strategy-between the EU and AMCs in the labour migration field. This could be done in the framework of the Neighbourhood Action Plans for 2011-2013 currently being negotiated with AMCs.
  4. **A region-wide review of the working and impact of current bilateral temporary and circular migration experiences**, assessing their economic, social and human dimensions, and detecting positive gains and outcomes with the aim of activating new cooperative dynamics in the Euro-Arab Mediterranean context.
  5. **Establishment of a Skills Enhancement Fund**, within the legal framework of the Global Approach to Migration and the institutional framework of the Euro-

Mediterranean Partnership, aimed at addressing the issue of brain drain caused by the migration of highly-qualified workers from AMCs to the EU. This scheme might be designed as a skill development cooperation fund whose amount would be calculated as a function of the number of skilled migrants who go from AMCs to the EU for a certain period (for example, the last ten years). This fund would be earmarked for cooperation programmes aimed at i) improving the skills of graduates staying in the county, ii) improving the quality of university programmes in the country, iii) increasing the number of graduates produced in the country (through scholarships), iv) encouraging the return of highly-qualified migrants to their country of origin.

6. **Establishment of a regional system for disseminating employment offers throughout the Euro-Mediterranean region** in order to better match the demand and supply of labour.
7. **Establishing a Euro-Mediterranean programme of traineeships** in European and AMC companies for AMC graduates and vocational training students.
8. **The design of an EU-wide scheme to encourage return migration to AMCs**, in particular the return of skilled labour migrants, through appropriate incentives implemented at the EU Member State and AMC level, including the possibility of returning to countries of destination.

Introduction

This report explores the relationship between labour market performance and emigration flows in Arab Mediterranean Countries (AMCs). It examines recent labour market conditions and the impact of labour market reforms on employment, unemployment, the informal economy and migration flows. In a globalized world economy, workers perceive international migration as a channel to access overseas labour markets. Individuals choose, subject to certain constraints (such as those imposed by migration policies), whether to participate in the domestic labour market or in an overseas labour market. Thus, conditions in domestic labour markets play a pivotal role in the decision to migrate overseas. In turn, emigration can potentially affect national labour markets, though this reverse impact has been little studied.

Literature

Literature on migration and development is vast, even if it is far from being a "burning issue of our time" (Hanson 2008). The interaction between migration and labour markets in countries of origin has excited less interest: the economic analysis of the impact of migration on labour markets has tended to focus on host countries. In contrast, the impact of migration flows on the working and performance of labour markets in countries of origin is less studied by researchers and national and international organizations. Policy-oriented research has focused to a large extent on EU and other developed countries' labour markets, migration flows as such and the integration of incoming labour migrants. Only in the last few years has the magnitude of the labour market challenges in the countries of origin begun to attract research and policy-makers' interest.

Indeed, although the literature on labour markets in developing countries is very large, research on labour markets in AMCs was limited until recently. The World Bank Report *Unlocking the Employment Potential of the Middle East and North African Towards a New Social Contract* (World Bank 2003) marked a surge in interest in these countries, and literature with a regional approach which has proliferated ever since. Of particular note is the series of FEMISE Country Profiles on AMCs with a major section on Human Resources and Labour Markets (FEMISE 2004-2005), and the studies undertaken by the European Training Foundation on employment policy reform (ETF 2006), vocational training systems (ETF and World Bank 2005) and the transition from school to work (Van Trier 2007) in Southern and Eastern Mediterranean Countries. Arab Human Development Reports (UNDP 2002, 2003, 2005 and 2006) were another milestone, pointing to a lack of participation of women and a deficit in knowledge and education (together with bad governance) as two of the main obstacles to development in Arab States. But once a general overview and assessment of the challenge has been made, it is fair to acknowledge that little progress has been made in the literature, to a large extent due to the lack of reliable and exhaustive data.

The same is true for migration in AMCs, where in a few years we have evolved from a no-man's land to seeing the emergence of a series of specialized research centres, such as CARIM (Consortium for Applied Research in International Migration) and a boom in literature (see Schramm 2006). This late emergence of a literature on migration in the region is most remarkable, since, in fact, the region is more globally integrated through labour mobility than through investments and trade. According to the World Bank, the MENA Region accounts for some 3% of the world's GDP, receives just over 1% of global direct investment and accounts for some 5% of global trade flows. In contrast, the region is a major player in the international movement of people: some 10% of the world's remittance inflows are directed to MENA countries.

More recently, a connection between labour markets and migration has slowly been made. A first attempt was the ILO/IOM/OSCE *Handbook for Effective Labour Migration Policies in Sending and Receiving Countries in the Mediterranean* (ILO/IOM/OCE 2007). In the present year, the World Bank's research programme on MENA countries jobs and people mobility culminated in the publication of a wide-ranging report and four background papers (World Bank 2009a). But this is a research field still very much 'under construction'. In particular, the lack and the unreliability of data sources both for labour markets and for migration flows, a bigger problem in the region than anywhere else in the world with the exception of Sub-Saharan Africa, make any solid research extremely difficult, and forces researchers to work on empirical evidence from other regions or to repeat the same faulty data sources again and again. However, this interaction is fundamental if effective employment policies in countries of origin and migration policies in countries of destination are to be designed and implemented, and, in this respect, the present Study takes another step forward in our knowledge.

As such, this Study could be seen as a part of the new "Global Approach to Migration" that the EU has committed itself to[1] and which is analysed in one of the commissioned Thematic Background Papers (Venturini, Fakhoury and Jouant 2009). In its conclusions, the European Council notes that "*the migration and development agenda will be intensified by increasing coherence between the Union's various policies, including their financial instruments, with a view to addressing the root causes of migration.*"[2] And there is no doubt that the performance of labour markets in AMCs, both in terms of job creation and wages and working conditions, is one, if not the main root cause of migration.

The Study draws a mainly descriptive overview of the performance of labour markets in AMCs and how these interrelate to migration flows. To achieve that, it draws particularly on the 8 attached National Background Papers commissioned to offer an in-depth insight into the situation in each country. These papers, responding to a common structure and questionnaire, focus on the labour markets in each of the AMCs and look at the effect that outward migration is having in each. The authors are all national experts and researchers specializing in labour markets: this ensures that they have a "southern" perspective, and that they focus on the performance of labour markets as determinant factors in migration flow, but also as a space for the multiple and complex effects produced by labour migration. The National Background Papers are based on national data sources, a choice warranted by the fact that this is the level at which data is collected and generated.

The added value of this report consists on its regional perspective, however difficult this was to bring together given the lack of data comparability and the variations in the labour markets and migration situation across countries. The magnitude of the data problem is such that we have included, at the end of each National Background Paper, a quick reference guide to statistics on labour and migration in the respective AMCs.

Data

The drafting of the National Background Papers for this Study has offered ample evidence of the shortcomings of national sources in the countries of origin: the inexistence of data on migration and heavily-contrasting official unemployment rates data (Algeria), the methodological contradictions (and hence confusion) despite the abundance of surveys and statistical sources in Morocco, the inaccessibility of much data in Tunisia, and the lack even of a census and official labour force surveys in Lebanon not to mention the inexistence of statistics on migration and the unreliability of data on employment in Syria

1 Presidency Conclusions of the Brussels European Council (15/16 December 2005),
http://www.consilium.europa.eu/ueDocs/cms_Data/docs/pressData/en/ec/87642.pdf, Annex I.
2 Presidency Conclusions of the Brussels European Council (14/15 December 2006) "A Comprehensive European Migration Policy".
http://www.consilium.europa.eu/ueDocs/cms_Data/docs/pressData/en/ec/92202.pdf.

(the National Background Paper for this country highlights data inconsistencies over time and across institutions). All this means that any researcher interested in labour markets or migration in the region must complete a veritable obstacle race. Population and employment data are disseminated following censuses and surveys, and often present serious shortcomings if not inconsistencies; besides that, huge, unexplained variations have been observed in published data, sometimes from year to year. International organizations most often take up data coming from national statistical sources without questioning their validity or enquiring how the data was elaborated, incorporating the shortcomings of national data but blurring their origin. In turn, very often data published by international organizations are not established as a result of actual data collection but rather are self-generated by econometric models. The researcher becomes an investigator.

As the notes on data sources on labour markets and migrations prepared for this Study and included as Annexes to the National Background Papers have shown, this is a shared problem throughout the region, and on a scale unknown in other regions. A recent report on *Training and Employment in the Northern and Southern Mediterranean Region* (Medstat 2008) published in the framework of the Medstat regional statistical cooperation programme has not gone beyond compiling existing statistical sources, without a real added value. So the first major challenge any research on labour markets and migration in the AMCs has to face is the scarcity and unreliability of data sources. Most analysis on the region is made on the basis of guesstimates drawn from fragmentary and often incoherent data sources or from empirical evidence from other regions transposed to the region through econometric estimations; the inappropriateness of those methods is revealed when one submits the results to detailed analysis. Statistical work with current data, let alone quantitative economic analysis, is hardly possible. Even the construction of simple comparative tables for the region is often incompatible with methodological rigour (as shown in the tables of this report, which reflect inconsistencies in the National Background Papers, in turn taken from most reliable national statistical sources available[3]). Comparability and consistency is hampered by the discontinuity of sources, the delay in the availability of data (sometimes the most recent data available are several years old, as shown, for instance, in Tables 4.2.1 and 5.2.1), and the implicit assumptions or calculation methods. So, as with any other data on labour markets and migration flows in the region, all the data and tables provided in this report, extracted from National Background Papers, should be used with caution and double-checked. However, the order of magnitude they convey gives an accurate insight into the processes and challenges examined here.

The Study

Despite marked national variations, the ten background papers which are synthesized here show that there are common elements and trends in all AMCs, and that all of them, from Morocco to Syria, share roughly the same challenges (though, of course, with differences in magnitude and emphasis): they are net exporters of labour, have a large number of unemployed citizens, in particular among the young and among women, underperforming education systems, oversized State sectors and a very large informal sector. This justifies the AMC grouping selected for the Study, instead of other groupings more commonly used by international organisations for convenience (in particular, the Middle East and North Africa or the MENA countries grouping, which also includes Iraq and Iran and the Gulf Countries). It also opens up a wide area of opportunity for regional cooperation on these issues, particularly as all eight AMCs under study belong to the Euro-Mediterranean Partnership.

In the final chapter of the Study, this analysis is used as a basis for developing concrete policy recommendations both for the EU and for AMCs, but also for EU-AMC economic co-operation. The analysis and the recommendations here aim to be relevant for EU migration policy-making, but also

3 An example: data for the number of unemployed for Syria can vary between 454,000 and 1,444,074 depending on whether official figures or "corrected figures" are used to account for the larger than registered labour force. Discrepancies between figures in Tables 1.2.1 and 2.4.1 are explained by such data inconsistencies.

for EU employment policy-making: as shown in one of the Thematic Background Papers, so far the latter has certainly taken labour immigrants in EU labour markets into consideration, but has barely touched on the labour markets in the countries of origin, and the impact that EU policies and labour migration to the EU could have on them. But, of course, the Study is also relevant for the design and implementation of economic co-operation in the framework of the Euro-Mediterranean Partnership and the European Neighbourhood Policy. Indeed, in the last two years, the first Euro-Mediterranean Ministerial Meetings on Migration and Employment have been held (in Algarve in November 2007 and in Marrakech in November 2008), with a view to substantiating co-operation between the EU and its Mediterranean Partner Countries in these fields. Finally, the performance of labour markets in AMCs and the implications for migration is a question of relevance too in the framework of the Euro-Mediterranean economic dialogue at a multilateral level taking place in the annual Euro-Mediterranean Meeting of Ministers of Economy and Finance, since labour market performance is directly related to the macroeconomic policies discussed in this framework. Coherence between all these policies and fields of cooperation is in itself a major issue.

In any case, what is clear is that labour market mismatches, both in quantitative (unemployment, low participation rate) and qualitative terms (qualifications, skills) are the major economic and social challenge that AMCs will face in the coming ten to fifteen years, and the EU cannot ignore these developments in its close neighbourhood. The current global economic crisis has already begun to hit AMCs (see Section 2.7), though with a lag in relation to Europe, and it may make the situation even worse than the one described in the National Background Papers; indeed, as we commissioned, discussed and reviewed the papers with the group of Study experts, evidence that the situation was already deteriorating emerged again and again. This makes policy action even more urgent, and the present Study even more timely, as pointed out by the Egyptian Minister for Manpower and Migration, Mrs. Eisha Abdel Hady, in the opening session of the Final Conference of the Study.

The Study is organized as follows**.** In the first chapter we undertake a brief analysis of demographic dynamics and the prospects for and the nature of employment in AMCs. This culminates with an estimation of job creation needs in the coming 10 years in order to absorb the increase in the working age population: 15 million new jobs will be needed over this period, 2.4 more if the extremely low labour participation rate of women (at around 20% of working age women now) increases by 5 percentage points.

The second chapter is devoted to an analysis of the performance of labour markets in AMCs in terms of wages and unemployment. We review the legal regulation of labour market as one of the determinants of this performance, as well as the role of the informal economy (which absorbs close to half of total non-agricultural employment in the region) and other major challenges such as women and youth exclusion from the labour markets. The composition of unemployment is analysed in detail, as well as the trend of average wages: in most AMCs, the gap with EU wage levels has increased over the last few years.

In the third chapter we try to establish a link between this performance and the national employment policies implemented in each country, with particular attention to Active Labour Market Policies and recent changes in labour market legislation or employment policies. We conclude that the scope for improvement in national employment policies in AMCs is very wide. This chapter ends with some general thoughts on policy options that might reduce the daunting labour markets mismatches in the region.

In Chapter 4 we address the issue of outward labour migration, its magnitude, characteristics and role in the economic system of AMCs. Chapter 5 then focuses on the impact of outward labour migration on AMC labour markets, one of the main focuses of this Study. In particular, we address the question of whether or not the migration of graduate workers leads to a "brain drain" of qualified human capital in these countries, as well as the impact of remittances on wages, labour participation and employment. A brief analysis of circular migration and the impact of return migration closes this chapter.

In Chapter 6 we turn to EU migration policy. After a review of the process of development of a common EU migration policy (still incomplete) culminating in the *Global Approach to Migration* adopted in December 2006, we analyse the adequacy of the new policy instruments to attract skilled migration to the EU (in particular the Blue Card approved last May) and the scope for, implications of and conditions for matching EU labour demand as the population ages with the increasing excess labour supply AMCs experience as they complete the demographic transition. We conclude that there is a window of opportunity if the right policies are implemented (both as regards the implementation of legal migration schemes and the upgrading of the skills of AMC labour). Finally, we explore the extent to which the Euro-Mediterranean Partnership and the European Neighbourhood Policy become appropriate policy tools to take advantage of this opportunity.

All chapters (and sometimes sections) are preceded by a brief review of existing theoretical literature and empirical evidence related to AMCs. This review is particularly exhaustive in relation to the impact of migration on labour markets in AMCs (Chapter 5), as one of the Thematic Background Papers is devoted precisely to this literature review (Marchetta 2009).

The Study concludes with a chapter including some proposals for action and policy recommendations. Indeed, the Study is meant to trigger a much needed debate among policy-makers of EU institutions, EU Member States and AMCs and with social partners on the interaction between labour markets performance and migration flows, and the consequent policy requirements.

1. The Labour Supply in AMCs: Determinants and Prospects

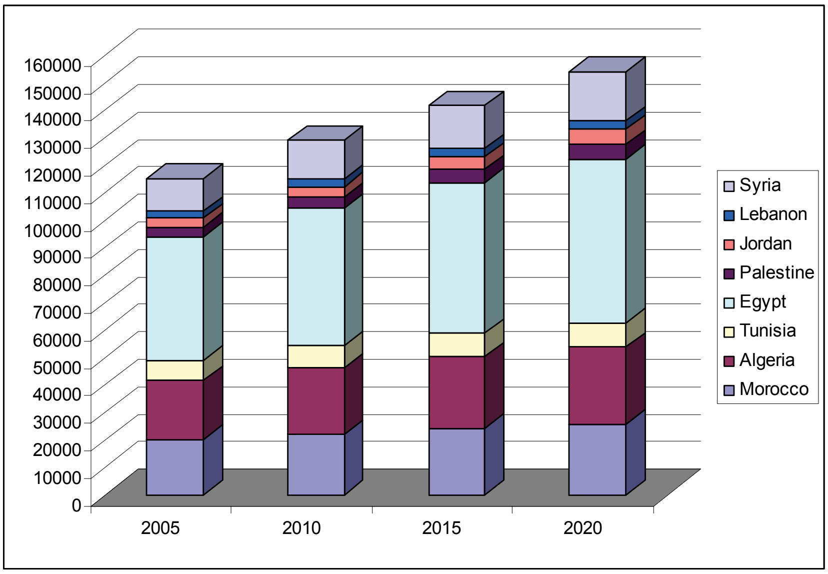
1.1 Demographic Dynamics and Prospects

Arab Mediterranean Countries will face the most challenging phase of their demographic transition in the next ten to fifteen years. According to the latest available data, the total population of the 8 countries considered in this Study amounts to more than 180 million persons (see Table 1.2.1). The population growth rate, though it has decreased substantially over the last decade in all AMCs, is still at an average of 2% a year. In terms of fertility rates demographic behaviour there has already reached (in countries like Tunisia or Morocco) or is rapidly converging towards the long-term equilibrium level, but the rapid pace of this demographic transition has given rise to a very young population structure.

More than 30% of the population is under 15 and will enter working age in the next few years, and another 35% are in the 15-30 age bracket and so have entered the labour force in the last few years. This has been interpreted as a demographic gift to the extent that the proportion of the working age population to total population, two thirds on average, will increase steadily until 2035-2045, depending on the country in question. But it also entails an unprecedented challenge to Arab Mediterranean Countries: to create jobs for the largest generation in their history, to benefit from this advantageous demographic structure and to avoid large-scale frustration and social tensions.

This challenge will last for several decades, since the working age population will continue growing in most of these countries until at least 2040. But the highest growth rates will come in the next ten to fifteen years, as shown in Figure 1.1.1. Between 2010 and 2020, the working age population of AMCs will increase by 2.5 million persons a year, from 129 to 154 million over that period. Egypt alone concentrates almost 40% of the region's working age population and will provide much of that increase, and the three central Maghreb countries a third of it. Given the reference period chosen, these figures are completely independent from fertility developments, since the young who will enter the labour market in fifteen year have already been born. So, save health or natural catastrophes, the size of the labour force will depend only on the labour participation rate.

Figure 1.1.1. Working Age Population in AMCs (000 persons), 2005-2020.



Source: National Background Studies from national statistical sources.

To sum up, the demographic scenarios in the region for the next decade can be described, in general terms, as follows: population will still grow at an average of 2%, with a more than proportionate 2.8-3% growth rate for working age population as new generations enter the labour market and a 4% labour force growth rate as an increasing proportion of working age population (in particular women) seek jobs. The National Background Papers describe this process in detail.

1.2 Characteristics and Composition of the Labour Force and Employment

The most salient feature of AMC labour markets is the very low labour participation rates. At less than 50% of the working age population, they have the lowest regional rates in the world, substantially below the world average of 61% (ILO 2009). This is due, to a large extent, to the lowest female labour participation rates (in relation to the female working age population) in the world: 21.66%. This, combined with high unemployment of close to 15% of labour force, leads to a high dependency pattern: less than one in three persons in the AMCs actually has a job (see Table 1.2.1).

Another important feature of AMC population is the fact that a high proportion of it, over 45% on average, still lives in the countryside: 45% in Morocco and 57% in Egypt (but only 22% in Jordan). The implications of this fact are manifold: indeed the activity rate may be overestimated (as it includes non paid family aid), and the main migration flow in the coming decades will not be outwards from the country, but from the rural areas to cities (and from lower productivity to higher productivity jobs), so that the economic growth needed to absorb the growing labour force must be higher than it has been to date.

Table 1.2.1. Total Population, Working Age Population, Labour Force and Employment in Arab Mediterranean Countries, latest available years.

	Morocco (2005)	Algeria (2007)	Tunisia (2007)	Egypt (2005)	Palestine (2007)	Jordan (2005)	Lebanon (2007)	Syria (2007)	TOTAL
Population	30172000	34096000	10225100	72850000	3719198	5473000	4227000	19405000	**180167298**
Working age population	20061000	22666401	7676700	45045800	2049273	3251000	2791000	12779420	**116320594**
Labour Particip. Rate	56,30%	44,00%	46,80%	49,90%	41,90%	38,30%	43,40%	50%	**49,37%**
Male	83,80%	72,80%	68,80%	74,60%	67,70%	66,40%	66,90%	78,80%	**75,38%**
Female	29,00%	14,70%	25,30%	22,70%	15,70%	11,70%	21,10%	20,10%	**21,64%**
Labour force	11312000	9968900	3593200	22483600	875285	1308000	1493000	6389710	**57423695**
Current employment	10056000	9146000	3085100	20443600	647711	1123780	1340000	4945636	**50787827**
Unemployment	1092194	1374700	508100	2040000	227574	184220	178756	1444074	**7049618**
% Unemployment	9,80%	13,80%	14,10%	9,30%	26,00%	14%	9,20%	22,60%	**12,28%**
% Population employed	**33,33%**	**26,82%**	**30,17%**	**28,06%**	**17,42%**	**20,53%**	**31,70%**	**25,49%**	**28,19%**

Source: National Background Papers from national statistical sources. Official figures. Average labour participation rates are weighted by the working age population.

Women Remain Largely Absent from the Labour Market

In the last three decades, one major phenomenon in AMC labour markets, besides the massive migration from the countryside to cities, has been the growing feminization of labour supply, to a large extent linked to an improvement in education attainments amongst women and job opportunities arising in the public sector. Over the last years, there has been a consistent trend in the integration of women into the labour markets, as reflected in the labour participation rates. These have increased in all countries in the region, adding between 0.3 and 1 percentage points a year over the last decades. Though it must also be said that there were setbacks in female labour participation in certain countries, such as Morocco (where the absolute number of active women fell between 1995 and 2005 from 1,491,000 to 1,320,000) and Syria (where the official labour participation rate for women fell from 21.3% in 2001 to 14.40 in 2007), in both cases closely related to fluctuations in agricultural production and employment.

This notwithstanding, the labour participation rate of women in AMC is still the lowest in the world (an average of 21.64% of working age women in the region, more than 20 percentage points below the developing countries average), and combined with high female unemployment rates leads to a striking fact: five out of six women of working age in the region do not have a job, with major implications for equality and even development (see Martín 2006 and 2008). Taking into account that in all AMCs except Morocco new female graduates outnumber male graduates, the waste of educational investments this exclusion entails is unsustainable for the AMC economic systems. Extreme cases of low female participation rates are Jordan (11.7%), Algeria (14.7%) and Palestine (15.7%). And this despite the fact that female labour force data includes so-called "non paid family aid". On the other hand, advances in the labour participation rates of women are often precarious: as the cases of Syria and Morocco show there are episodes of regression due sometimes to bad farming years, sometimes to a reduction of jobs in the exporting-manufacturing sector, and sometimes to a retreat from the labour force following on from a fruitless job search. In general terms, the volatility of the labour participation rates of women is higher than for men, reflecting the more frequent entry and exit of women from the labour market, in particular in the urban context, which highlights the often subsidiary role of their work. In any case, women's participation in the labour force is strongly correlated with education and urbanization.

In the near future, the dynamics of the labour supply in AMCs will depend to a large extent on the pace of the increase in the labour participation of women.

Low Qualification of the Labour Force

Free education, publicly provided, has been a central tenant of the social contract in most AMCs since independence. Governments significantly expanded the education system, driven by rapidly expanding young populations and the need to build national identities. Formal education indicators have been improving rapidly with massive investment in education and training, in particular in terms of enrolment rates. However, the focus on universal access to education has often overshadowed the issue of quality resulting in some serious labour market imbalances caused by inadequate educational and training systems, which do not respond to a changing demand in skills.

On average, only one in seven persons in the AMC labour force has a university degree (with Palestine, Egypt and Jordan having higher than average rates). Although there has been a wide access to secondary education throughout the region (and in some cases, such as Egypt, to vocational training), 44% of the AMC labour force still has no diploma or only a primary education diploma. Morocco and Syria are the countries with the lowest formal education profile (see Table 1.2.2), and the urban-rural education gap is still remarkable in all countries, with major implications for the prospects of productivity increase in the rural sector.

The higher unemployment rates amongst educated workers makes the picture even more worrying when the qualification profile of employment instead of labour force is considered. This is clearly shown in National Background Papers (Sections 1.2). Combined with the high concentration of qualified workers in the public administration, this means that there is a significant number of employees in the industry, trade and communication sectors who have not even finished their primary level studies. This poses an enormous challenge in terms of productivity increase and competitiveness prospects for AMC economies.

Table 1.2.2. Composition of AMC Labour Force by level of education (%, latest available year)

	Morocco (2007)	Tunisia (2007)	Egypt (2006)	Palestine (2008)	Jordan (2007)	Lebanon (2004)	Syria (2001)	TOTAL
Labour force	11148373	3593200	23624780	875285	1403600	1493000	6369000	**48507238**
None	40,4%	11,6%	28,9%	14,0%	4,0%	10,0%	23,7%	**28,0%**
Primary	40,9%	36,7%	14,2%	31,4%	44,3%	50,1%	53,5%	**29,4%**
Secondary	10,2%	36,7%	33,0%	27,4%	26,7%	16,0%	14,9%	**24,9%**
University	8,5%	15,0%	18,9%	27,2%	24,9%	20,1%	6,1%	**14,9%**

Sources: National Background Papers from national statistical sources. Data for Algeria is not available. Please note that the figures do not refer to the same years. Aggegation of levels of education to four main levels has been neccesary for comparability purposes, but should not mislead about the diversity of the education systems across AMCs and the diversity of options available in each country for each level, in particular for secondary education (including vocational training, lower and higher secondary) and sometimes university (including post-secondary institute degrees, for instance in Egypt). The total sum of percentages for Egypt, Lebanon and Syria do not add up to 100%. For Lebanon and Syria, labour force figures are the latest available.

However, in some AMCs, such as Egypt, the qualifications held by the labour force are improving substantially. Indeed, a significant growth in educational attainment in Egypt has altered the composition of the labour force over the past three decades. In the 1980s, 40% of those entering the labour force had not achieved a primary level of education. By 2005, 70% had received a secondary education or better (Assaad 2007). In this respect, the most dramatic shift in the educational composition of the male working age population is the sharp increase in the proportion of technical secondary school graduates from 1988 through 2006. This was accompanied by a steady reduction in the proportion of illiterate males and literate males with no educational degrees. The proportion of university graduates has also increased over the last 25 years, but at a slower pace than that of technical secondary graduates. The male labour market is, therefore, increasingly dominated by technical secondary school graduates who now make up over 30% of the male working age population in both urban and rural areas. The educational composition of the female working age population exhibits similar trends: the share of vocational secondary school graduates has increased, especially in rural areas, and the share of illiterates has come down significantly. These compositional shifts have enormous implications for female labour force participation, since female participation rates increase significantly once women reach the technical secondary level.

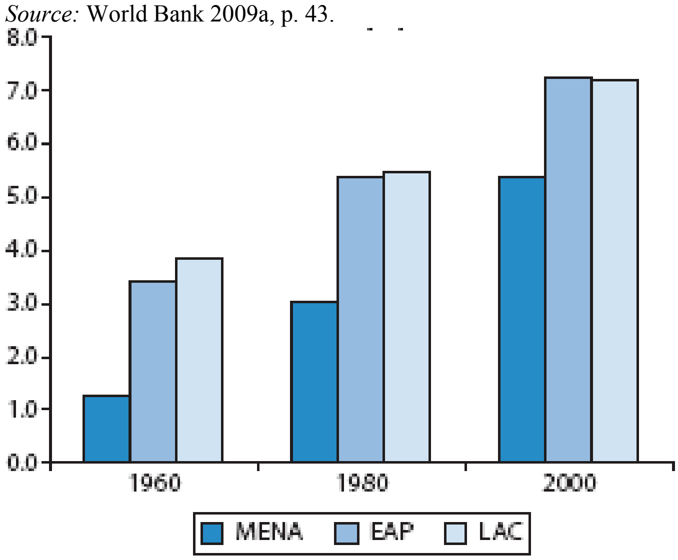
This particular case notwithstanding, in general terms, it can be stated that the level of qualification of workers in AMCs is very low, to the point of jeopardizing both the development prospects of their countries (bleak prospects for productivity increases) and the possibility of benefiting from the increasing demand for medium-skilled labour coming from developed countries, and in particular Europe, in the coming decades. A recent report by the World Bank focusing on labour migration highlights this risk:

> "the [Middle East and North Africa, MENA] labour force is currently predominantly low skilled. If these ratios do not change (and assuming constant labour force participation rates), [by 2050] the labour force under 40 years of age will mainly expand among those with primary education or less (25 million) and to a much lesser extent among the secondary educated (9 million) and the tertiary educated (7 million). […] Poor education outcomes in MENA countries remain an obstacle to compete in global labor markets. More important, MENA's education systems do not deliver and remain at the root of MENA's educational and technological shortcomings."
> (World Bank 2009a, pp. 40-48).

As Figure 1.2.1 shows clearly, although educational attainment more than doubled between 1980 and 2000 in MENA countries, there is still an important gap to be filled in comparison to other developing countries. Beyond this low level of formal qualification, the lack of skills demanded by the labour market (be it due to a misalignment of demand and supply of labour for certain disciplines or to the lack, among "skilled" labour, of soft skills such as communication or labour environment skills) is the other education-related challenge in the region.

Figure 1.2.1. Average years of schooling in the adult population. Developing countries

MENA: Middle East and North African countries
EAP: Eastern Asiatic countries
LAC: Selected Latin American Countries
Source: World Bank 2009a, p. 43.



High Prevalence of Employment in the Public Sector

The public sector has been pivotal in AMC labour markets. It has played a major role in absorbing the increasing labour force during the past three decades. It has been the preferred sector of employment for many new entrants to the labour market, particularly women and graduates, as it offers better working conditions and salaries. The guaranteed civil-service employment for graduates of secondary and higher educational institutions which prevailed until the 1980s in most of these countries led to a concentration of educated workers in the public sector and pushed university studies towards the humanities and social sciences, the disciplines demanded by the public sector. The State or public sector employment absorbs around 30% of employment in Arab Mediterranean Countries, and a far larger percentage of working women.

Guaranteed employment, without concern for productivity in the public sector, led to the prevalent rent-seeking behaviour among graduates and created strong disincentives for work in the productive sectors. The result has been the poor use or even the waste of educated labour by distorting incentives in labour markets. In an analysis that can be extended to many other countries in the region, Assaad (2006) argues that the longstanding policy of the Egyptian government to guarantee government employment to upper secondary and university graduates has given households misleading signals. These shaped the educational decisions of households and encouraged them to invest heavily in forms of education, such as technical secondary and higher technical institute education that have very low returns in the private sector. Faced with strong demand, the government supplies this kind of education at the expense of being able to guarantee basic quality education to all. This combination of educational and hiring policies have resulted in the distortion of household decisions and the misallocation of human resources to unproductive activities, leading to the low productivity of these resources in the economy.

So by the early 1990s – prior to the economic reforms – the public sector was overstaffed and inefficient, and its wage bills a huge burden on government, while the growth of the private formal sector in job creation and absorption was limited. Thus, all structural adjustment programmes in the region had to address the question of public sector employment. Despite adjustment, public employment has continued to grow in most countries in the region (Morocco being a major exception), though at a slower rate than private employment. Indeed, the State continues to be the employer of last resort for women in the region.

1.3 Estimation of Job Creation Needs Until 2020

Estimating the number of new jobs needed (locally or abroad) to absorb the increasing labour force is not straightforward as it depends on a number of assumptions such as the growth level in the working age population, labour force participation rates (which are reduced for young people as they stay longer in the education system but which increases with the increase in educational attainment, in particular for women) and unemployment rates. To provide a rough estimate of the number of jobs needed, a number of assumptions have been made: first, that the current number of unemployed workers remains constant; second, that the same is going to happen to current labour participation rates. Finally, that no migration flows will take place (which is of course a counterfactual assumption, but necessary to make projections with a certain degree of certitude). To exclude any impact from fertility rate developments and to frame our projections in a reasonable policy-making time framework, we decided to limit our exercise until 2020, i.e., to limit our estimates to the next 10 plus years.

Indeed, this makes sense, as tensions in all AMC labour markets will peak in the coming ten to fifteen years. As shown in Table 1.3.1, adding together the projected needs for new jobs calculated for this Study under conservative assumptions, on the basis of national statistical sources, AMCs will need more than 1,500,000 additional jobs a year over the coming 10 years just in order to provide employment opportunities for new labour market entrants at current levels of employment and to keep the (already very high, almost 7 million) number of unemployed unchanged. And this assumes constant labour participation rates. This amounts to a sustained growth rate in total employment of 3% over those years. These estimates should be considered the lower limit of job creation needs.

Table 1.3.1. Estimation of Yearly Job Creation Needs until 2020*

	Morocco	Algeria	Tunisia	Egypt	Palestine	Jordan	Lebanon	Syria	TOTAL
2009-2020*	180000	225100	84600	715526	45977	53501	15000	221000	**1540704**
+5% labour participation of women	228000	317600	107077	742286	70294	54845	16700	247000	**1783802**

*Assuming unchanged labour participation rates and number of unemployed.

Source: National Background Papers from national statistical sources.

The 15 million new jobs which are needed over the next ten years amount to a 30% increase in relation to the current level of total employment in those countries, and between 1/3 and 2/3 more jobs per year than have been created over the last five years of relative job creation boom in the region. Thus the *status quo* in terms of employment policies and development models risks making tensions in the labour markets unsustainable for the social fabric, greatly affecting social cohesion and stability in the region – and hence adding to migration pressures.

Assuming that, as is happening already in most countries in the region, the participation rate of women increases over the next decades to catch up to the world average, an increase of 5 percentage points in the labour participation rate of women in the next ten years, consistent with the average trend observed in the last ten years, this would add 243,000 jobs a year to the number of jobs to be created for the 8 countries under consideration. This, together with migration, is the main adjustment variable to these projections and to the dynamics of AMC labour markets in the coming years.

A Declining Employment Elasticity to Growth

An often neglected aspect in the analysis of AMC labour markets is the question of the job intensity of economic growth. Most of the estimates of average growth rates needed to absorb the growing working age population are made under the assumption that current employment elasticities to growth, i.e. that the percentage change in employment will remain constant with every percentage change in GDP growth.

Estimates for the elasticity of employment in AMCs are sketchy (and often disparate; see Table 1.3.2), and often transferred from estimates in other developing countries. However, what is clear is that AMCs have, in most cases, employment elasticities which largely exceed the world average: for the MENA region, an 0.88 value over the 2000-2005 period is almost three times the 0.3 world average (see Table 1.3.2). This, and the observed downwards trend over the last years, point to a further decrease in this elasticity in the near future. Indeed, the trend towards lower elasticities is confirmed by the results from most countries in the region (with the notable exception of Egypt). A particular case is Lebanon: the latest estimates provided by the World Bank's resident mission suggest that the labour elasticity to value added growth during the period 1997-2007 did not exceed 0.1, which indicates a significantly inelastic domestic labour market (virtually no job creation).

Table 1.3.2. Employment elasticity to growth

	Morocco	Algeria	Tunisia	Egypt	Jordan	Lebanon
Labour demand elasticity (ILO)	0.78	1.37	0.72	0.68	0.97	0.61
Labour demand elasticity (national calculations)	0.35		0.5		0.855	0.1

Source: ILO Bureau of Statistics and National Background Papers.

The region's high elasticity figures suggest that GDP growth has been very employment-intensive in the last few years, but this also suggests that labour productivity growth is poor. This weak increase in labour productivity over the last years can be explained by the fact that many of the jobs created in these economies are created in the agriculture sector, the State sector or low productivity services. Indeed, average employment elasticity in the industrial and service sector in the region (0.35 and 0.5, respectively) are clearly below the average current ratios. To the extent that future job creation will concentrate itself in the modern, urban segments of those sectors (with employment elasticities of 0.5 or even lower), a higher growth rate than in the past will need to be brought about through a certain amount of job creation. This may determine whether, in order to achieve the average 3% growth of net employment needed every year to absorb the increase in the labour force, a sustained growth rate of 4% or 6% or higher a year will be necessary.

2. The Labour Markets Performance in AMCs

2.1 Labour Market and Employment in AMCs: A Review of International Reports

The 2003 World Bank report set out a series of alarming projections on job creation needs in MENA countries over the coming two decades, underlining how national employment policies, and indeed AMC economic models at large, are ill-equipped to face those challenges. World Bank (2003) estimated that, in order to absorb labour force growth in the region, 80 million new jobs would need to be created before 2020, plus 20 million more to absorb the existing unemployment at that point (15% of the labour force). To achieve these goals, the region would have to maintain average annual economic growth rates of 6 to 8% a year, far higher than the average 3.6% growth witnessed in the 1990s. So, it concluded, “in no small measure, MENA’s economic future will be determined by the fate of its labour markets”, and “if current trends continue, economic performance and the well-being of workers will be undermined by rising unemployment and low productivity”. This has been confirmed by all later reports on this issue. As a solution, the World Bank proposed a thorough review of the social contract established since independence that had produced high growth rates between 1965 and 1985, but poor labour market (and economic) outcomes in the two decades since. To unlock the job creation potential of the Middle East and North Africa, it argued, labour market reforms were necessary, but insufficient, and MENA countries needed to travel the road of three transitions: from a public sector dominated to a private sector dominated economy, from closed to more open economies, and from oil dominated to more stable and diversified, that is, a completely new social contract. It linked the need for these economic reforms to political reform and liberalization in the region (improving governance) and, although it recognised external partner support as critical, it stated that the main responsibility rested with MENA countries themselves. So it set up a framework for a thorough review of the economic model, but without entering into details on a country by country or sector by sector basis.

Three years later the World Bank published a further report on Middle East and North African labour markets, this times with a more optimistic tone: *2007 Middle East and North Africa Economic Development & Prospects: Job Creation in an Era of High Growth* (World Bank 2007b). It took stock of the four successive years of high growth experienced in the region and the high level of job creation (4.5% on an annual basis between 2000 and 2005, the highest of all developing regions) over this period, with the subsequent decline in unemployment (from 14.3 to 10.8 of the labour force), with even a moderate increase in the labour force participation of women. The double challenge of the quantity and the quality of jobs created was underlined, the latter depending on an increase in productivity, which would only assure the sustainability of the jobs created. In a section devoted to migration (section 2.2.3), it was stated that migration provides an important mechanism for risk diversification and income growth, but the sheer size of the job challenge means that labour demand abroad cannot fill the employment gap. Thus, the region must maintain through 2020 the exceptionally high rates of employment growth seen in recent years, while advancing reforms to provoke even greater job creation, particularly in the private sector. The World Bank insisted on structural reform, in particular in the field of governance (quality of public administration and public sector accountability), improvement of business climate and trade policy. It also advocated the establishment of efficient safety nets to protect those who may be left behind by structural changes, so that “labour policy must strike a balance between these two fundamental objectives – protecting workers from the risks of unemployment, lost income, and poor working conditions, and encouraging job creation and the allocation of labour to its most productive users”.

The same year, the EuroMed Employment project[4] published its conclusions and recommendations. There (Martín *et alia*, 2007) the employment challenges of AMCs were once again highlighted on the basis of 8 national studies. It was concluded that, despite a wide consensus on the status of employment as the main economic and social challenge to the Euro-Mediterranean region, employment as such had not been considered a direct priority of the Euro-Mediterranean Partnership and no single cooperation or technical assistance project had addressed this issue to date. It also anticipated the weak or irrelevant impact of the Euro-Mediterranean Free Trade Areas on employment, except in some specific manufacturing industries which could damage female employment in the region. The project report made a series of concrete proposals on the issue of employment in the framework of the Euro-Mediterranean Partnership, including a regional multilateral system of monitoring and evaluation of employment development and employment policies in AMCs and the adoption of a Euro-Mediterranean Employment Strategy.

In turn, the Forum of Euro-Mediterranean Institutes of Economic Research (FEMISE) published its first report on "The Challenge of Employment in the Mediterranean Countries" (FEMISE 2007). It followed a series of Country Profiles on AMCs including extensive studies of human resources and labour markets in each country (Country Profiles 2004-06). The report sized up the magnitude of the employment challenge in the region and analysed its root causes, underlining high employment elasticity to growth (reflecting low productivity growth, low investment levels and a mismatch between education outcomes and labour market demands). It estimated that, in order to maintain present levels of activity and unemployment, 22.5 million jobs would be needed before 2020, and even so the number of unemployed in AMCs would increase from 6.5 to almost 9 million. This level of job creation was consistent with the figures reached over the last five years of high growth. The report addressed the possible contribution of migration to absorb an increasing labour force in the AMCs: it insisted on the brain drain effect of migration for AMCs and the socio-cultural barriers to massive migration to the EU. The report concluded that the structure of employment and the specialization of AMC economies indicated that they were not taking advantage of trade liberalization, and that the level of wages in the region were high in relation to labour productivity, and that minimum wages, ignored in the informal sector, undermined competitiveness. It concluded advocating further reform of macroeconomic policies and labour codes and establishing "cooperative migration schemes", in particular with EU countries.

As regards AMC employment policies, the only region-wide review published to date has been the report *Employment Policy Reforms in the Middle East and North Africa* (ETF 2006), also based on a set of country reports; but these stop short of undertaking comprehensive employment policy assessments. The report highlighted the weak relation between education investment and growth and employment in MENA countries, explaining this by the lack of concomitant labour market reforms to make effective use of the increasing pool of educated workers. But its main focus was on public interventions in the labour markets (institutional setting of employment policy formulation, social dialogue, labour legislation, active labour market policies and vocational training systems), reviewing reform initiatives already on course in the region (in most cases with international donors support) and advocating for a "comprehensive labour market reform", analyzing the political economy factors affecting the prospects for such reforms. Of particular interest is the discussion of the transferability of the *flexicurity* approach to MENA countries (p. 59).

Barbier (2006), meanwhile, undertakes a thorough analysis of labour market intermediation in Maghreb countries, focusing on the question of employment policy institutions, an important source of inefficiencies throughout the region.

4 A joint research project by the Euro-Mediterranean Trade Union Forum, Fundación Paz y Solidaridad, Friedrich Ebert Foundation and the Euro-Mediterranean Human Rights Network, financed by AECI, Spanish Internacional Cooperation Agency.

In December 2007, the European Commission organized a "Euro-Med Employment Workshop" in preparation for the first Euro-Mediterranean Conference of Employment and Labour Ministers held in Marrakech in November 2008[5]. FEMISE, the European Training Foundation and the International Labour Organization prepared reports for this workshop (see ILO 2007.)

Two very recent reports returned to these issues: the World Bank (2009) *Shaping the Future. A Long Term Perspective of People and Job Mobility in the Middle East and North Africa* report (see below in Section 4.1, since it deals precisely with the interaction between labour migration and national labour markets), and the recent Middle East Youth Initiative report on employment prospects for young people in the region. The latter (Middle East Youth Initiative 2009) summarises several years of research and a series of working papers from across the region. It stresses the challenges imposed by the mismatch between the qualifications of young people in the Middle East and North Africa and the demands of the labour market, in particular as the six years of economic boom since 2008 have not contributed much to fix those challenges or reduce youth unemployment. It looks particularly at the school-to-work transition and how institutional arrangements in MENA countries are at the heart of youth exclusion in the region before focussing on the new risks the economic crisis entails for young people.

Finally, it is important to refer to the five editions of the Arab Human Development Report (UNDP 2002, 2003, 2005, 2006 and 2009). The first of the series pointed to the "knowledge gap" and the "capabilities deficit" on the one hand (UNDP 2003), the underutilization of women's capabilities through political and economic participation (UNDP 2006), and the lag in "participatory governance" (UNDP 2005) as the main factors in Arab underdevelopment. The 2007 report on human security pays special attention to unemployment as one major component of human insecurity in Arab countries (UNDP 2009, pp. 10-11 and 108-111).

2.2 Regulation of Labour Markets in AMCs

As shown in the National Background Papers detailed descriptions of labour law concerning hiring and firing and Boni (2009), AMC labour legislation is extremely rigid on paper – with labour regulations similar to the ones in continental Europe and levels of labour market rigidity close to or even above those of the OECD – but highly flexible in practice due to poor enforcement and the prevalence of informal employment.

The Doing Business Database of the World Bank summarizes this situation: AMCs, with the exceptions of Tunisia and Jordan, are in the lowest bracket of the world ranking (under rank 100 out of 183 countries in the database) (World Bank 2009b). Significantly, no single AMC undertook any labour market regulation reforms in 2006, 2007, 2008 or 2009 (last major labour code reforms in the region date back to 2003 in Egypt and Morocco). This lack of reform endeavours in the "Employing workers" field contrasts with the remarkable reform zeal of AMCs in other "Doing Business" dimensions, in particular in Jordan and Egypt (World Bank 2009b, pp. 3-7). Given the labour markets reforms undertaken in other regions of the world, the relative rank of most AMCs is deteriorating (in all of them but Syria and Tunisia, see World Bank 2008).

The consequences of this kind of rigidity are straightforward: as shown by the same report, rigid labour markets regulations are associated with a high informality rates and high female unemployment. Figure 2.2.1 shows this correlation and just how relevant it is for AMCs (see sections 2.4 and 2.5).

5 Conclusions of the first Euro-Mediterranean Conference of Employment and Labour Ministers, Marrakech, 9-10 November 2008, http://ec.europa.eu/external_relations/euromed/conf/employment_health_conclusions_1108_en.pdf.

Table 2.2.1. Indicators of Labour Market Flexibility, Doing Business Report 2010

Indicator	Morocco	Algeria	Tunisia	Egypt	Palestine	Jordan	Lebanon	Syria	MENA (2009)	OECD (2009)
Difficulty of Hiring Index (0-100)	89	44	28	0	33	11	44	11	22.5	25.7
Rigidity of Hours Index (0-100)	40	40	13	20	40	0	0	0	41.1	42.2
Difficulty of Redundancy Index (0-100)	50	40	80	60	20	60	30	50	31.6	26.3
Rigidity of Employment Index (0-100)	60	41	40	27	31	24	25	20	31.7	31.4
Redundancy cost (weeks of salary)	85	17	17	132	91	4	17	80	53.6	25.8
Employing workers (World Rank 2010)	**176**	**122**	**108**	**120**	**135**	**51**	**66**	**91**		
Rank 2009	**168**	**118**	**113**	**107**	**109**	**52**	**58**	**122**		

Source: World Bank 2009b and World Bank 2008.

The extreme case is that of Morocco. It has one of the most rigid labour market regulations of all Arab and European countries. Yet interestingly, this is no obstacle to increasing work precariousness, as section 2.1. of the National Background Paper on Morocco demonstrates (Jaidi 2009). The proportion of manufacturing industry workers with temporary contracts (average length of 2.6 months) has increased from 10% in 1999 to 15% in 2006.

Figure 2.2.1. Correlation between rigidity of labour market regulations and informal sector and female unemployment (181 countries)

Source: Doing Business 2009, p. 20.

The rigidity of labour regulations, combined with the low qualification pattern of the labour force, leads to a high degree of segmentation in labour markets in all AMCs. In general terms, five different wage-formation tiers are observed: the State sector, public companies, the private sector with the collective bargaining system, the private sector without collective bargaining (SMEs) and the informal sector. The most important by far in absolute numbers is the latter. The public sector is highly regulated and workers cannot be dismissed and wages are set relative to seniority rather than performance. On the other hand, in the private sector, a small proportion of firms abide by labour market regulations while the majority do not. So the labour market is highly compartmentalized and "labour mobility between economic sectors has been limited. Where it does occur, it has flowed from poorly-paid jobs in the agricultural sector to low-paid service sector jobs" or informal employment (see Saif 2006 for Jordan). The same is true of Jordan, Egypt, Syria, Morocco and Lebanon. Furthermore, labour mobility between civil service and private sectors, and also within the private sector is discouraged by the inadequate portability of benefits. This segmentation, and the low labour participation rates, explains the coexistence of high job creation rates over several years (2000-2007) with high unemployment rates, rates which even grew over the period in Jordan.

In several countries, such as Lebanon and Jordan (the latter until 2008), whole categories of workers are not subject to labour market regulations, in particular domestic servants employed in private homes and seasonal agricultural workers. The same applies in some countries to all foreign workers.

The social security regime, despite its low coverage (as a percentage of the total population, less than 50% on average; only 5 to 10% of the elderly receive a pension), adds to this general rigidity. Social security contributions for formal employment in most AMCs are in the range of 20% of wages for Morocco and 34% for Algeria (Lebanon 26%, Tunisia 24%) and discourage labour-intensive investments. In practice, the effective rate of deductions as a percentage of total labour costs is much lower. In addition: (a) employers and workers evade them, through mutual agreement and under-reporting of wages; (b) employers may impose tax avoidance on workers as a pre-condition for employment; or (c) employers may also diversify their workforce through the use of contract/informal labour with a resulting decline in their overall obligation to payroll contributions.

In conclusion, AMC labour markets are characterized by *de facto* flexibility, due to the widespread evasion of labour regulations (not only in the informal sector), high unemployment and poor law enforcement. So labour regulation in AMCs imposes a high degree of rigidity and costs but, paradoxically, a low level of worker protection. This pattern may have severe implications for the levels of informal employment in general and of female unemployment in particular, partially explaining these two specificities of the AMC labour markets (see Figure 2.2.1).

In this context, recent European labour markets experiences with so-called *flexicurity* schemes, providing at the same time more flexibility of the labour markets and more protection to workers, combined with enhanced active labour market policies, could only be usefully explored in AMCs for the small segment of the population enjoying extensive social protection systems. But for any flexicurity scheme to be effective in AMCs, a precondition would be to extend coverage of social security systems (as mentioned above, social protection systems in AMCs are notoriously weak, and unemployment insurance schemes, for instance, do not exist or cover only a small fraction of the working population) and improve the design and implementation of active labour market policies (see section 3.1) to effectively contribute to the employability of unemployed workers.

2.3 Increasing Wage and Income Differentials

Wage and income levels and differentials are recurrently mentioned as among the most important pull factors for labour migration. They might also explain the direction of migration flows: as set out below in Section 4.2, AMC skilled labour tends to migrate to the US and Gulf countries (an income of almost 37,000 euros PPP/year/person in 2007), whereas European countries are a less attractive destination and tend to receive unskilled workers.

Data on average wages is scarce, not collected in a systematic way and unreliable, and is to be considered under the caveat of widespread non-compliance and informal employment (absorbing between 45% and 55% of total employment). Table 2.3.1 provides an overview of wage averages and minimum wages in AMCs. The segmentation of labour markets mentioned above makes the picture even more complex, since it is often the case that a country has different minimum wages for different categories of workers (Algeria, Morocco, Syria). However, all AMCs have some form of minimum wage regulation.

Table 2.3.1. Minimum and average wages in Arab Mediterranean Countries. Monthly wages, in euros

	Morocco	Algeria	Tunisia	Egypt	Palestine	Jordan	Lebanon	Syria
Public sector (avg)	489	180		153	349	335		150
Private sector (avg)	281	220	338	106	315	268	484	144
Minimum wage	163	120	133,5	102		157	256	103

Source: National Background Papers based on latest available official data. For Lebanon private sector, the labour costs and not wages are considered.

Minimum wages are often too low to maintain a typical family and too high to ensure international competitiveness. In Syria, for instance, the minimum monthly salary amounts to 103 €, nowhere near enough to sustain a typical Syrian family (on average 5.6 persons) above the poverty line. An economist has recently[6] calculated the minimum monthly family salary for assuring food subsistence above the poverty line at 13,580 SYP (224 €), and, if other needs are taken into account, 22,063 SYP (364 €). Jordan's national minimum wage is currently 150JD (157 €). Given that the average Jordanian household is composed of 5.7 individuals, a household with one member earning the minimum wage would fall far below the poverty line, which is currently set at 506JD (530 €) per person annually. This poverty gap is even more pronounced given that average household size among the poorest three deciles is 7 individuals.[7] To lift a household of this size above the poverty line would require a monthly income of 295JD (308 Euros). This is significantly higher than even the income of one breadwinner earning the average wage for low-skill jobs. Minimum wages tend to operate as a ceiling for informal sector workers. On the other hand, in several countries (such as Lebanon and Jordan) the minimum wages are not applied to foreign workers and exclude certain categories, causing high unemployment among unskilled workers.

As shown in the case of Morocco, this does not prevent a debate about the level of minimum wages. In comparison to some of their industrial competitors in EU markets, minimum wages in AMCs are higher and closer to average wages than in competing countries (Romania and Bulgaria are often quoted in this respect, where according to Eurostat in 2009 minimum wages stand at 140 € and 122 € respectively), hence reducing AMC competitiveness and encouraging informal employment. However, as shown in National Background Papers, this has not prevented the distribution of income from becoming more unequal over the last years.

As for the comparative development of wage and income levels in purchasing power parity, National Background Studies demonstrate that in the cases of Morocco, Algeria (with a negative average annual increase in PPP wages of -1.7% in 1996-2006, in contrast with the 3% year increase in the EU-15), Tunisia, Syria and Jordan a divergence of average wages with those of the EU is observed. Thus, the good macroeconomic performance of most AMCs in the last ten years, which has been reflected in a progression of per capita GDP, has not been matched by a corresponding improvement in income distribution or wages nor a clear convergence path towards EU income levels (see Table 2.3.2).

6 See Kadri Jamil, Syrian Economic Sciences Society, April 22, 2008: http://www.mafhoum.com/syr/articles_08/jamil.pdf.

7 DoS (2006) Household Income and Expenditure Survey 2006 Report.

Table 2.3.2. GDP per capita 1995-2007 (PPP constant 2005 international US$)

	1995	2000	2005	2007
Morocco	2661 (10,69%)	2980 (10,57%)	3589 (12,13%)	3880 (12,55%)
Algeria	5631 (22,63%)	6087 (21,59%)	7176 (24,25%)	7310 (23,64%)
Tunisia	4422 (17,77%)	5444 (19,31%)	6445 (21,78%)	7102 (22,97%)
Egypt	3586 (14,41%)	4211 (14,94%)	4574 (15,46%)	4628 (14,97%)
Jordan	3547 (14,25%)	3632 (12,88%)	4342 (14,67%)	4628 (14,97%)
Syria	3759 (15,11%)	3725 (13,21%)	4002 (13,52%)	4260 (13,78%)
Lebanon	7979 (32,06%)	8328 (29,54%)	9561 (32,31%)	9546 (30,87%)
AMC (a)	**4294 (17,26%)**	**4743 (16,82%)**	**5417 (18,31%)**	**5537 (17,91%)**
Euro Area	**24884**	**28194**	**29590**	**30921**

a) Weighted average. In parenthesis, the ratio to GDP per capita of the Euro Area.

Source: World Development Indicators Database, World Bank

State Jobs, Migration and Reservation Wages

The higher salaries and the job security of public administration jobs exert a powerful attraction on young workers, in particular graduates, in a region where public sector employment is already the highest in the world (over a third of all jobs are in the State sector). But the implicit social contract guaranteeing a State job to all graduates has been terminated, and the State no longer provides realistic employment prospects. Thus, migration has become the employment solution of choice (Martín 2009). Indeed, migration prospects and (in some cases, e.g. Lebanon) the high cost of living in towns translates into a high reservation wage (i.e. the minimum income for which a worker is ready to work) which, in turn, creates severe distortions in AMC labour markets.

Indeed, a widespread characteristic of wage structures in AMCs is the high prevailing reservation wage. The higher wages in the public sector typical of AMCs, as well as the prospects for migration to higher salary countries, disincentives many workers from searching out a low-paid job in the local market. When reservation wages are higher than equilibrium wages (in theory determined by marginal productivity) for a particular category of workers, this leads to structural unemployment. This is particularly evident in the case of the graduate unemployed having expectations of getting a public sector job despite the bleak prospects of getting one. In Jordan, according to research carried out by the World Bank (2007, p. 21), about 20% of all unemployed individuals and 45% of unemployed women have submitted applications to the Civil Service Bureau. This is a key factor in understanding AMC labour market behaviour.

2.4 Unemployment Situation and Trends in AMCs: Excluding Youth and Female Workers

The eight AMCs under study have an official number of unemployed workers close to 7 million, almost half of them in Egypt (2 million) and Syria (close to 1.5 million), with Algeria and Morocco also exceeding the 1 million mark (data from National Background Papers based on national official data, estimated using the ILO definition and hence excluding workers with an informal employment). The first comments these figures merit is that they are most probably a major underestimation. The ILO definition of unemployment (registering as employed any person having worked at least one hour during the last week before the survey is conducted, and hence including subsistence activities and non-remunerated work, as well as any kind of underemployment) is not fit for economies with a high incidence of informal employment. In any case, it is notoriously inappropriate as a variable in determining the migration potential of a county, for which the relevant variable would be full-time paid employment. But we do not have this kind of data.

Second, in all countries under study (with the exception of Palestine), unemployment rates have clearly fallen in the last few years, in the most dramatic case, Algeria, from 29% in 2000 to less than half of that figure today. Between 2002 and 2006, Morocco, Egypt, Jordan and Syria experienced too a significant reduction in unemployment rates of between 3 and 6 percentage points. But this positive trend has hardly benefited female employment, and, at least in some cases, female employment has actually fallen. Morocco is a good case in point. There the participation rate went down from 50% in 1996 to 44.8% in 2006. Young workers have also benefited to only a limited extent from this employment boom, which has tended to favour older workers and in some cases immigrant workers. Jordan is an extreme case in this respect: 63% of new jobs created between 2001 and 2007 went to immigrant workers. In this regard, the reduction in unemployment rate gives only a partial view of labour market performance: it is the employment rate, i.e. the ratio of total employment to the population, which is more significant (see Table 1.2.1). Now, given that population has been growing at a faster rate than employment over the last ten years or so, this ratio has tended to increase over time.

As shown in Table 2.4.1, unemployment is especially high for new entrants to the labour force and for women. Across the region, unemployment is essentially a problem relating to the labour market insertion of a growing and increasingly educated youth population. So the vast majority of the unemployed are younger than 30, have at least an intermediate level of education, and have never worked before. Indeed, a unique feature in AMCs is the increase in unemployment rates as the educational attainment of workers increases, with graduate unemployment rates typically doubling the rates for workers with primary or no education (which points to a major mismatch between educational qualifications and labour market demand, and a worrying waste of educational investment). This unusual unemployment structure suggests that a significant part of unemployment may be the result of high job expectations on the part of workers with some formal education, and a low valuation of these credentials on the part of the private sector because education systems have concentrated on making public sector jobs accessible rather than on building the skills that are in demand in the private sector. In the case of women it may reflect as well a lack of alternatives to public sector employment. Young women with secondary or university studies, which already, as we saw above, have the lowest participation rates in the world experience unemployment rates of close to 30%.

Table. 2.4.1 Unemployment by sex, age and level of education (latest available year)

Unemployment (2007, latest available year)	Morocco (2007)			Algeria (2007)			Tunisia (2007)		
	M	F	TOT	M	F	TOT	M	F	TOT
(by age, 000)	**794,5**	**297,6**	**1092,1**	**1072**	**302,7**	**1374,7**	**334,1**	**174**	**508,1**
15-24	17,90%	15,50%	**17,20%**	25,35%	39,93%	**27,38%**	31,58%	30,94%	**31,4%**
25-34	13,80%	15,80%	**14,40%**	16,14%	22%	**17,31%**	17,43%	22,45%	**19,9%**
35-44	5,60%	6,50%	**5,90%**	6,06%	6,56%	**6,11%**	5,27%	7,55%	**5,9%**
45-54	2,80%	1,50%	**2,40%**	3,20%	2,50%	**3,11%**	3,26%	3,31%	**3,3%**
55-64	0,60%	0,40%	**0,60%**	1,50%	1,96%	**1,53%**	3,11%	1,48%	**2,9%**
(by level of education, 000)									
None	3,00%	1,60%	**2,40%**	4,58%	2,59%	**4,23%**	6,3%	5,2%	**5,9%**
Primary	11,60%	14,10%	**12,00%**	14,48%	16,28%	**14,64%**	12,4%	18,0%	**13,5%**
Secondary	18,00%	25,60%	**19,80%**	12,97%	21,53%	**14,68%**	14,8%	17,4%	**15,4%**
University	17,20%	30,40%	**21,80%**	12,37%	23,30%	**16,99%**	13,4%	27,5%	**19,0%**
Unemployment rate	**13,9%**	**20,9%**	**15,4%**	**12,9%**	**18,3%**	**13,8%**	**12,8%**	**17,8%**	**14,1%**

Unemployment (2007, latest available year)	Egypt (2006)			Palestine (2008)			Jordan (2007)			Lebanon (2004)			Syria (2007)			TOTAL		
	M	F	TOT	M	F	TOT	M	F	TOT	M	F	TOT	M	F	TOT	M	F	TOT
(by age, 000)	**861,6**	**1074,1**	**1935,8**	**190**	**38**	**228**	**142**	**66**	**208**	**111**	**35**	**153**	**734**	**710**	**1444**	**4239,2**	**2697,4**	**6943,7**
15-24	10,3%	27,0%	**14,6%**	38,8%	47,3%	**40,2%**	23,0%	47,8%	**28,3%**	20,0%	18,9%	**19,7%**	%	%	**%**	**21,0%**	**28,5%**	**21,6%**
25-34	9,6%	38,7%	**17,5%**	25,1%	27,2%	**25,5%**	8,0%	24,8%	**12,0%**	6,4%	9,2%	**7,2%**	%	%	**%**	**14,0%**	**30,1%**	**16,9%**
35-44	2,2%	13,1%	**4,9%**	21,3%	11,0%	**19,5%**	5,2%	11,6%	**6,3%**	3,7%	6,0%	**4,2%**	%	%	**%**	**5,7%**	**10,4%**	**6,1%**
45-54	0,8%	1,1%	**0,9%**	20,8%	6,1%	**18,4%**	4,4%	5,9%	**4,6%**	3,1%	3,3%	**3,1%**	%	%	**%**	**3,5%**	**1,8%**	**2,9%**
55-64	0,6%	0,0%	**0,5%**	20,3%	2,6%	**16,9%**	3,8%	3,5%	**3,8%**	3,3%	1,8%	**3,1%**	%	%	**%**	**2,4%**	**0,7%**	**1,9%**
(by level of education, 000)																		
None	1,2%	0,4%	**0,9%**	30,4%	4,7%	**23,8%**	9,1%	11,0%	**9,3%**	5,8%	5,3%	**5,2%**	%	%	**%**	**5,2%**	**1,8%**	**3,9%**
Primary	1,7%	4,3%	**2,0%**	31,5%	6,0%	**29,0%**	11,8%	26,3%	**12,6%**	15,2%	8,1%	**9,1%**	%	%	**%**	**11,3%**	**9,6%**	**9,9%**
Secondary	6,6%	34,2%	**13,8%**	24,3%	16,6%	**23,6%**	8,1%	25,6%	**12,4%**	9,6%	9,8%	**9,7%**	%	%	**%**	**13,0%**	**28,5%**	**15,6%**
University	9,3%	24,9%	**14,4%**	18,5%	39,4%	**27,2%**	9,6%	26,1%	**15,5%**	11,4%	10,9%	**11,1%**	%	%	**%**	**13,0%**	**25,8%**	**17,4%**
Unemployment rate	**4,7%**	**18,6%**	**8,3%**	**26,5%**	**23,5%**	**25,6%**	**12,0%**	**25,0%**	**13,8%**	**8,8%**	**10,2%**	**9,2%**	**14,5%**	**53%**	**23,6%**	**12,2%**	**27,9%**	**14,9%**

Total AMCs average rates are weighted by population. For Egypt, the age brackets stated in the statistics are different from those stated in the Table: 15-19, 20-29, 30-39, 40-49 and 50-59; the same happens for the level of education categories, which have been regrouped. In the case of Syria, uncertainty about official figures does not allow for a reliable breakdown of unemployment figures (see National Background Paper).

Source: National Background Papers based on national statistics.

Youth Unemployment

An important characteristic of unemployment in AMCs is its young face. The average unemployment rate in AMCs for the 15-24 age bracket is 21.6%, well over the world average of 14%. So the young in these countries comprise between 70 and 80% of all the unemployed[8]. It is this age bracket too that has the highest propensity towards migration. The risks of youth unemployment for social instability are well known[9], and in AMCs the share of youths between 15 and 24 who are neither active participants in the labour force nor in education is estimated at 15% for males and 47% for females. But the economic costs of this labour market exclusion should not be underestimated either. Based on the assumption that youths earn on average 80% of the average national wage, and, in addition, that females earn on average 25% less than males, it is possible to calculate the exact financial impact on a national economy of excluding youths from the job market (Chaaban 2008, p. 8). If it is assumed that youth unemployment should be equivalent to adult unemployment (as zero unemployment among youths is arguably unrealistic), youth unemployment is costing Algeria 1.76% of its GDP annually, Egypt 1.38%, Jordan 1.84%, Lebanon 1.07 %, Morocco 3.6%, Syria 2.36% and Palestine 1.69% in foregone earnings, with a total yearly cost for these seven countries of 14.4 billion US$ (in PPP) (*ibid*.). The cost of male youth unemployment is more than twice as high as that of female youth unemployment. This is, to a large extent, the result of fewer females participating in the active workforce. If this gauge of youth exclusion is expanded so as to examine the cost of youth inactivity, the figure grows significantly. The definition of the joblessness rate includes the official unemployment rate as well as the inactivity rate of youths who are not engaged in education. Such a measure is perhaps more illustrative of the real costs involved in the inability of youths to successfully enter the job market. In the case of AMCs, based on the same assumptions as above, youth joblessness is costing Syria 9.09% of its GDP yearly, Egypt 7.29%, Jordan 4.14% and Lebanon 2.74%, an annual cost of 28.8 billion US$ (in PPP). These figures highlight the fact that hardly any other policy measure could make a bigger contribution to the economic development of those countries than the promotion of youth employment.

Beyond its economic cost, youth unemployment is also consolidating the generational gap and the segmentation of the labour market, where the insider/outsider dynamic tends to prevail. The decline in unemployment rates in higher age groups (see Table 2.4.1.) reflects two factors: first, the problems facing young persons when they enter the labour market, in terms of the aforementioned mismatch in education and skills and the long period necessary to find a job. Second, to an increasing extent, at least in certain countries, the migration of young workers of 25 and above helps lower the unemployment rate, as it tends to 'evacuate' persons who cannot find a job on the local market.

Many reasons could explain high unemployment rates among young workers. On the demand side, a scarcity of entry-level opportunities for young people in the productive sectors stems from factors including economic instability and the deterioration of macro-economic conditions (inflation, budget deficit and public debt); and the recruitment practices of employers, who frequently resort to personal contacts, thereby reinforcing the perception of a lack of opportunity. On the supply side, the most important factors are the gap between the skills of the new entrants to the labour force (professional training and a high level of education) and the labour market needs, as well as the reluctance of young workers to accept low-skilled jobs with poor wages and working conditions. The lack of an effective guidance and orientation system and the lack of internship opportunities to gain work experience also play a role. This situation has led to a mismatch between the demand for and the supply of labour.

8 Youth unemployment data from National Background Papers are substantially lower than rates registered, for instance, in the Arab Labour Organization database: over 45% for Algeria in 2005/2006, 39% for Jordan, 33% for Palestine, 27% for Tunisia and 26% for Egypt, 22% for Lebanon and 20% for Syria and 16% for Morocco (UNDP 2009, p. 109).

9 The last Arab Human Development Report underlines the threat to human security in Arab States derived from youth unemployment (UNDP 2009, pp. 10-11 and 108-111).

The situation has improved in some cases for young male workers, but still entails long spells of unemployment prior to a first job: in Egypt, in 2006, 50% of male school leavers had found their first job within 2 years of leaving school, down from three years in 1998. 75% found jobs in 2006 within 5 years of leaving school, whereas in 1998 it would have taken nearly 8 years for that proportion to find jobs. However, the female rates of transition from school to work are much lower and do not exceed 25% even after 15 years: for women there is no perceptible improvement in the transition period from 1998 to 2006.

Female Unemployment and Precariousness

The other important (and aggravating) aspect of unemployment in AMCs is its gender dimension: female unemployment rates are higher than those for males for all ages and all levels of education (with the exception of the "over 45s" and the "no education" categories, where the retreat of women from the labour market, and hence inactivity, leads to frictional unemployment rates). The increase in female unemployment rates generally experienced in AMCs over the last years is due to the growth in the female working-age population and the rising labour force participation rates brought about by higher educational attainment. Like female participation in the labour force, female unemployment is strongly correlated with education. In Jordan, for instance, more than half of all unemployed women have post-secondary educational qualifications.

Educated women have been much more negatively hit by unemployment than educated men. As a result, in part, of structural adjustment programmes and privatization they can no longer find jobs in the public sector, while the private sector gives clear priority to men (in Egypt, for instance, in 2006 37% of working women worked in the public sector, compared to 54% in 2006). In Morocco, between 1999 and 2005, women got a third of all new jobs created in the private sector, more than their 27% share in the labour force, but they occupied two thirds of the jobs lost, so that, in net terms, they only experienced a 4.8% net increase in employment over this six years period. And female employment remains concentrated in low productivity sectors (62% work in the agricultural sector).

Barriers for female entry into the private sector are due to a number of factors, including employers who are unwilling to hire workers whose commitment to the labour force may be short-lived, predominant social norms, and attitudes limiting what constitutes gender-appropriate employment, as well as mobility constraints, constraints that limit women's job search activities to local labour markets (a barrier underlined by four of the National Background Studies, those for Egypt, Jordan, Lebanon and Palestine). At the other end of the spectrum, it is important to take into consideration that a growing proportion of total female employment (up to 50% in Egypt and Morocco) corresponds to unpaid family aid, in particular in the agricultural sector.

Graduate Unemployment

University graduates are still a minority of the AMC labour force, ranging from 6.1% of it in Syria and 8.5% in Morocco to 26.9% in Palestine and 24.9% in Jordan (see Table 1.2.2). Indeed, at least half of the AMCs (Morocco, Algeria, Tunisia and Syria) still produce a relatively low proportion of university graduates. However, graduate workers show a higher than average propensity to unemployment. The data demonstrates that, in the past decade, unemployment has been rising among individuals with secondary and university education, reaching double the unemployment rate levels for persons with no education at all.

Graduate unemployment reflects, in part, a major mismatch between skills of supply and demand (and hence a distortion of the education systems in those countries): there are too few graduates in technical and scientific disciplines and those there suffer from the poor quality of university education. More than half of the graduates are women, who are mostly excluded from participating in the labour market. It also reflects a problem of expectations (see discussion of reservation wages in section 2.3).

But one should not forget that one of the main causes of graduate unemployment in AMCs is the lack of demand for graduate employment in the private sector, reflecting the underdevelopment of high added value economic activities and more generally the choice for a low wages, low added value export-oriented economic model, often promoted by the tax incentives structure (see Saif and El-Rayyes 2009, National Background Paper on Jordan). To this extent, it is a whole review of industrial policies, and more generally economic policies, what is required to face this challenge (see Section 7.3).

In any case, graduate unemployment is a source of major macro-economic inefficiency, as the human capital of the country is wasted, the education investment made in these workers is lost and does not contribute to economic growth and, most worryingly, it reduces the incentives for new generations to invest in education (unless this investment is related to migration prospects) instead of engaging in informal employment, bypassing the positive externalities derived from this investment for the economy as a whole.

In all countries but Palestine there is a positive correlation between the level of education attained and the unemployment rate, which is very specific to the region (see Table 2.4.1). In Maghreb countries, in particular, this is a major problem. In Tunisia, for instance, the average level of education among unemployed workers exceeds that of the employed population: between 1994 and 2007 it has gone up from 4.5 to 8.3 years of education for the unemployed and from 5.4 to 7.3 for the employed.

Expectations and reservation wages also play a role in explaining high rates of graduate unemployment, to the point that, as stated by other authors in the past (see Middle East Youth Initiative 2009, pp. 8-9), the National Background Paper for Egypt points out that “probably for them [graduate workers] unemployment is a luxury”.

This phenomenon of graduate unemployment in AMCs is attracting much public and specialized attention, in part due to the higher degree of political mobilization among this class, and in part also to the higher potential interest they have as migrant workers for host countries. However, it should not be forgotten that, whereas graduate unemployment underlines a major distortion in resource allocation and incentives in the economy, in most AMCs the majority of the unemployed are not graduate, but have only a primary or secondary education. In Tunisia, for instance, 35% and 40% of the unemployed have only primary or secondary education, whereas graduate unemployed make up 20% of total unemployment. So it is unemployment among workers with only primary or secondary education that poses the main challenge in absolute figures (and hence also in migration potential terms): only slightly more than 1 out of the 7 million unemployed in AMCs are graduates.

2.5 Informal Employment

Given the current state of labour markets in AMCs, an active and dynamic informal sector remains the only systemic response to their malfunctioning, working as a buffer to allow an important part of the workforce to make a living. So in practice it serves as a kind of security net, offering jobs or at least income generating activities to excluded workers. This has become a structural, integral part of labour markets in AMCs and indeed the main objective symptom of the distortions they are exposed to.

If we know little about employment in AMCs and data is very unreliable, the knowledge about informal employment is even slighter, even in those countries, such as Morocco, where specific surveys have been conducted to gauge the informal economy (in 1999 and 2008). The share of informal employment in AMCs can be estimated in the 35-55% range for non-agricultural employment, but estimates for the same country show huge variations (depending on methodology and definition of “informal”). For Syria, for instance, they varied between 19% and 59%. In Morocco, informal employment has been estimated at 45% of non-agriculture employment. And in Algeria, excluding the public administration, where by nature there is no informal employment, and agriculture, where it is not well measured, informal employment goes to make up 45% of total employment. According to Assaad (2007), in Egypt informal employment has increased from 57% in 1998 to 61% in 2006.

Moreover, informal employment is a very dynamic reality, and shows a higher degree of resilience to economic crisis. In Egypt, 75% of new entrants to the labour market in the first five years of this decade were entering informal work, compared to only 20% of workers in the early 70s. Furthermore, half of those who found work with formal private sector employers did not have a formal work contract, and even more lacked social security coverage, i.e. had no decent job. In Syria, 69% of jobs created between 2001 and 2007 were in the informal sector. Thus, the informal sector has acted as a buffer for unemployment. However, the jobs created in this sector tend to be of lower quality in terms of wage, sustainability and work conditions.

The economic implications of this state of affairs are far from negligible. On the one hand, whereas informal employment provides the sole income source for large segments of the population, it has become a major obstacle to the prospects of a *decent* job to the biggest generation in AMC history: the informal sector is a lever for precariousness and lack of protection for workers. On the other hand, informality hampers the human capital development of this generation, since informal first employment translates into fewer opportunities for better jobs in the future (Middle East Youth Initiative 2009, p. 10). Beyond these effects for workers, in some labour intensive sectors the informal economy hampers the development of the formal private sector (through unfair competition) and negatively affects the incentives for international investors to get established in AMCs (since they cannot afford to ignore labour regulations), undermining two pillars of the current economic model in those countries. In fact, the high degree of informality in the economy renders institutional regulation ineffective: it turns regulation into “paper procedures” imposing a transaction cost on economic actors, but without achieving its goals: this happens for minimum wages, social protection, the regulation of layoffs and severance payments or even trade union activity. To the extent that the scope of the informal sector favours a gap between *de facto* and *de iure* regulation, it reduces the elasticity of employment to reforms in labour market institutions, hence reducing the effectiveness of employment policies (see Chapter 3). And the prevalence of low productivity jobs in the informal sector poses another stumbling block for development of these countries

Bouklia-Hassane and Talahite (2008) argue that the size of the informal sector is positively correlated to the rate of unemployment, and indeed the National Background Paper on Syria shows how difficult it is to differentiate between the two. The dissemination of unemployment feeds a “reservation army” ready to accept the conditions of precariousness and the lack of institutionalization specific to the informal sector (see National Background Paper on Algeria, Bouklia-Hassane and Talahite 2009, pp. 24-25). With a model inspired by the Harris-Todaro rural-urban model, Bouklia-Hassane and Talahite explain why the informal sector does not absorb unemployment entirely under the (plausible and empirically supported) assumption that wages in the informal sector are below the minimum wage.

2.6 Inward Migration in AMC Labour Markets

Although evidence for inward migration is even scarcer than for outward migration, there is no doubt that this is an increasingly important phenomenon in AMC labour markets: this includes labour migrants from poorer Sub-Saharan Africa and Southern Asia countries seeking labour opportunities, refugees and transit migrants mostly on their way to Europe (who often end up remaining).

AMCs host more than 1 million legal immigrants of working age (2% of current employment), and an undetermined number of irregular or unregistered labour immigrants (which could exceed 2 million)[10]. In some countries of the region, such as Jordan and Lebanon, and with different specificities Syria, this has become a structural feature of their labour markets, favoured by the prevalence of informal employment. There are currently over 300,000 migrant workers in Jordan who filled 62.8% of the new jobs created in Jordan between 2001 and 2005 (World Bank 2007a, p. 21). Moreover, 89% of them have no formal education. So around one quarter of Jordan's workforce is composed of migrant workers the overwhelming majority of whom are engaged in low-skill, low-wage employment. Many of these migrants compete with low-skill unemployed Jordanians for employment, rather than complementing the existing workforce, and contribute to maintaining depressed wage levels.

In Lebanon, there are 120,000 registered foreign workers, mostly maids from Asia and Africa. There are also an estimated 500,000, mostly undeclared, Syrian workers, working primarily in construction and agriculture (even if their number was greatly reduced after the pull-out of Syrian troops in Lebanon in 2005). There is a lack of statistics and studies on the status of Syrian workers in Lebanon: some sources state that fewer than 100,000 are legally registered (Kawakibi, 2008), but other sources talk of between 300,000 and even 1.5 million Syrians; independent observers, however, estimate the number at between 400,000 and 600,000 (almost 47% of the Lebanese labour force). Although Syrian workers mostly work in construction, according to Kawakibi (2008) increasing numbers of Syrian workers are engaged in manufacturing, though with no health or social insurance. In contrast to Jordan, in Lebanon it cannot be stated that foreign workers compete for low-skilled jobs with locals. Indeed, Kawakibi (2008) states that many studies prove that unemployment in Lebanon is not affected by immigrant Syrian workers, as the majority of unemployed Lebanese are skilled workers, and the highest rate of unemployment occurs among residents with a secondary education and university degrees. There are too almost 450,000 Palestinians refugees, with a 60% unemployment rate and a lack of full working rights (according to UNRWA); translating into almost 150,000 unemployed Palestinians. This figure exceeds total unemployed Lebanese residents, estimated at nearly 137,000 in 2007.

Both in Jordan (where migration policy has been described as "easy entry for low skills; easy exit for high skills" – World Bank 2007a, p. v) and in Lebanon, there is a strong structural link between immigration and emigration flows. The Jordanian labour market is characterized by the emigration of a large number of highly-skilled Jordanians to GCC countries and the immigration of a large number of foreign workers to fill low-skill jobs. Inward remittances help to fuel the Jordanian construction industry, which mostly employs Egyptian migrant workers. Thus, inward remittances partly fund outward remittances. However, because inward remittances far exceed outward remittances, there is still a significant net financial gain for the Jordanian economy. In 2008, inward remittances were valued at 2.73 billion euros whereas outward remittances were only 354 million (but of course this accounting has to be qualified with the impact on skills endowment in the labour force, since emigrants are, in this case, far more educated than immigrants). In Lebanon, remittances amount to more than 4.5 billion USD per year, almost 23% of GDP[11]. Yet remittances mostly finance domestic consumption, and outward remittances are also very high (almost 4 billion USD). The country is therefore experiencing an economic cycle where remittances fuel real estate and service investments; which in turn increase the demand for unskilled workers mainly in construction and the cleaning sectors; thus contributing to an increase in inward emigration flows. Inward remittances are indirectly contributing to the high rates of outward remittances.

In other countries of the region legal labour immigration is rather marginal and is strictly regulated, although lack of thorough and reliable statistics may conceal part of this phenomenon. In all cases, immigrant workers in AMCs are often exposed to informal employment and below standard work conditions (in several countries they are excluded from labour legislation protection) and wages, undermining the decent job agenda. Data on irregular immigrants in AMCs are particularly scarce, but

10 National Background Papers and Fargues (2009, pp. 24 and 486).

11 Data from National Background Paper. Remittances to Lebanon as registered in the World Development Indicators database amount to 5.769 US$.

estimates place their number at close to 1 million overall (with Lebanon with 400,000-500,000 and Jordan with around 100,000 as top rankers). Another group worth mentioning are refugees: AMCs have one of the largest presence of refugees in the world, with a total of 1,400,000 official UNHCR refugees, the bulk of them in Syria (707,000) and Jordan (520,000) (Fargues 2008, p.12), plus the 4,5 million Palestinian refugees reported by UNRWA (in Jordan, Palestine, Syria and Lebanon). According to World Bank (2008b) figures, four AMCs stand amongst the Top 10 world countries in terms of the numbers of refugees that they host: Jordan (1.8 million), Palestine (1.7), Syria (0.4) and Lebanon (0.4)[12]. Obviously, these refugees also pose a serious market labour challenge.

Overall, in many AMCs geopolitical developments are a key factor in understanding labour market dynamics. In Syria, for instance, two major events in the last five years will shape any possible analysis of labour markets (and make national statistics largely inaccurate): the inflow of 1.7 million Iraqi refugees (7% of total population) and the sudden reduction of Syrian circular migration to Lebanon (involving several hundred thousand workers).

2.7 The Impact of the Economic Crisis

The global economic crisis has added to the series of labour market and education challenges the Arab Mediterranean Countries have not solved in the last 20 years of relative macroeconomic discipline and which have only begun to be tackled in the last six years of high growth. In the six years since 2002 economies in the region followed a high growth path (in the 5-6.5% range on average), which led to an average annual job creation rate of 4.5%, enough to offset the labour force growth rate of 3.6% a year on average (for a working age population growth of 2.8%). So global unemployment rates were reduced in all countries during this period of high growth rates, but average wages have not followed suit and the categories of workers most affected by unemployment or informal employment (women and the young, in particular) hardly benefited from this trend. The rate of precariousness of employment increased in many AMCs, rendering employees more vulnerable to economic downturns (Morocco and Algeria are two clear cases in point, as shown by National Background Papers).

AMCs have already begun to suffer the global economic crisis, though with a certain lag in relation to other regions of the world (see European Commission 2009, pp. 27-50). Growth prospects have been substantially readjusted downwards, in particular in countries like Jordan, Egypt or Morocco which are best integrated into the world economy: real GDP growth across the region is expected to shrink by more than two percentage points below the 4% mark in 2009 (IMF 2009a), or even further to halve to a regional average of 2.4% (European Commission 2009, p. 28). Thus, it seems that the high level of job creation witnessed in previous years will not be sustained over the next few years, though the impact on unemployment rates could be limited relative to other regions of the world (Behrendt, Haq and Kamel, 2009, p. 7). Only in Jordan, the downwards revision of growth projections between March and September 2009 translated into a readjustment of job creation projections from 893,000 to 734,000 over the 2009-2020 period, i.e., a reduction amounting to almost 10% of current employment over that period (see Saif and El-Rayyes 2009, National Background Paper, p. 10, and p. 9 of the former April 2009 version).

In any case, this crisis coincides, for AMCs, with the peak years of the youth bulge, i.e., the years when the number of entrants to the job markets will be highest (see Sections 1.1 and 1.3). As migration chances vanish as a consequence of the economic downturn in developed countries and the Gulf and some labour migrants return to their home countries (100,000 Egyptian migrants have reportedly already returned from Gulf countries), the long-lasting job crisis the region is suffering

12 See also the figures in Fargues 2009, p. 26, that are substantially higher for Jordan and Syria.

might intensify its social destabilizing potential, and the potential of AMCs to face it will be reduced. The link between migration and development has to be revisited due to the crisis.

Indeed, the current global financial crisis is already having indirect impacts on AMC labour market. First, as the demand for exports (e.g. textile industry and agricultural products) for European markets falls, this affects both manufacturing and agricultural sector outputs and employment and might lead to higher unemployment. Moroccan exports, for instance, registered a 32% fall in the first quarter of 2009, meaning that 20,000 jobs have been lost in the textile industry since the beginning of the crisis (more than 10% of total employment in this industry). Foreign direct investment has also been hit by the global financial crisis. In addition, as tourism declines (the fall in the number of visits amounted to 20% in Morocco for the first quarter of 2009 and 11% in revenues for Egypt in the first four months of 2009) this has wider implications given the importance of this sector for the economy as a source of foreign exchange and for employment. Finally, if the crisis affects the Gulf States and Arab labour importing countries this will lead to less demand for AMC workers in the region and may result in significant numbers of these returning. Indeed, the global recession may even lead to an increase in the number of skilled workers in some AMCs, as newly unemployed emigrants return from the Gulf and other destination countries; Lebanon and Jordan are particularly vulnerable to this scenario. For hydrocarbon exporters (first and foremost Algeria, but to a lesser extent Syria and Egypt), the fall in international prices relative to 2008 has had a major impact on export revenues, which in turn will affect State investment and social expenditure.

Thus, the AMC labour markets are not, by any means, immune to the repercussions of the current global crisis, and the International Labour Organisation foresees an increase of unemployment in 2009 of up to 2 million in the Middle East and North Africa (ILO 2009, p. 35); it is worth noting that those countries have no unemployment insurance scheme or only very limited coverage. The negative impact of the crisis on employment compounds the impact on living conditions of the food and oil price shock experienced since the summer of 2008, which seriously affected the purchasing power of many households. Official estimates by CAPMAS, in Egypt, put the inflation rate in urban areas at around 22.3% in November 2008, and although the situation has eased since then, it has not returned to previous levels.

Another key transmission channel of the global economic crisis to AMCs, though more resilient than other sources of revenue, are remittances (for a review of their importance in AMCs, see section 5.2). They are the main inward financial flows in many AMCs (22.8% of GDP in Lebanon, 20.3% in Jordan, 14.7% in Palestine and 9.5% in Morocco). The volume of migrant remittances is already reflecting the effects of the global economic crisis, despite the higher degree of stability remittances have shown in the past relative to other financial flows. After the stagnation they experienced in 2008 (following on from a decade of double-digit growth), remittances to Middle Eastern and North African countries are, after many years of growth, expected to shrink in 2009 between 1.4 and 5.2% (Ratha and Mohapatra 2009), depending on employment developments in OECD countries (exchange rate development and the eventual hardening of migration policies in development countries are the other relevant factors). Indeed, in Morocco, for instance, they already experienced a 15% fall in the first quarter of 2009. Apart from the negative impact of this decrease on the current account balance of recipient countries, this will cause a contraction in consumption (with an impact on employment) and a deterioration in the living conditions of the beneficiaries (for many families in AMCs, remittances partly compensate for the lack of access to formal social protection mechanisms).

3. National Employment Policies and Labour Markets Reform in AMCs

Faced by such daunting challenges and the added pressure the global economic crisis is certain to impose, it can be stated emphatically that AMC employment policies are not up to these challenges. A common element is the dissociation between good performance of macroeconomic indicators and a lagging behind in terms of better employment and increased social welfare for different segments of the population (National Background Papers and Middle East Youth Initiative, 2009).

A comprehensive employment policy should comprise the following elements: (i) investment promotion (mainly related to macroeconomic and sectorial policies) and a friendly business environment for the private sector to encourage job creation; (ii) active labour market policies (ALMPs), direct State intervention in the labour markets to increase the employability of workers; and (iii) labour market regulation. However, the performance of employment policy has to face the constraints derived, for all AMCs, from the size of first job-seekers unemployment, institutional rigidities and the extent of the informal sector, which sets a limit on the effect of institutional regulation and the performance of the labour market. Indeed, the importance of informal employment over total employed population points to the weak impact of institutions and institutional reforms on the development of employment and labour market structure. This is a vicious circle that is very difficult to break: labour reforms are ineffective because of the size of the informal economy, and the lack of effective implementation of labour regulation strengthens informal employment.

The other component which should be encouraged in all AMCs is the training-employment interface across all education levels and cycles. Any employment policy should, by nature, be articulated with an education and training policy aiming at increasing the employability of the young. This is at the heart of the failure of the education system both in terms of its internal (school drop-outs) and external (lack of integration into the labour market) effectiveness.

The situation varies across AMCs, but all of them offer wide scope for employment policy upgrading, both in terms of institutional setting and in terms of instruments. In Jordan, for instance, the work of the Ministry of Labour and its local offices largely centres on issuing work permits to foreign workers and ensuring compliance with labour regulations. Relatively few efforts and resources are directed towards the provision of active labour market programs.

In other AMCs, it is still not possible to speak of genuine national employment policies as such. The Lebanese Government, for instance, does not have a national employment strategy which identifies labour market challenges and tries to address them in a consistent manner. There is a Ministry of Labour (MoL) in Lebanon, but it has a minimal role in developing and engaging in national employment policy. No serious reform program is being currently contemplated. A draft Labour Law was proposed in 1992 and again in 2000 but remains just that, a draft. For this, there are, to date, no Active Labour Market Policies in the country. This situation is a by-product of at least two main factors: (i) labour market challenges have always been diffused in Lebanon by a ‘passive’ policy of encouraging emigration, as the Lebanese authorities have failed to address, in the last decades, the ‘push’ factors that cause Lebanon’s mainly skilled workforce to seek jobs abroad; (ii) Lebanese policy-makers have done very little to address the issue of high reservation wages (mostly linked to high private educational investments and a high cost of living), which discourage Lebanese workers from engaging in low-skilled jobs. Instead, an influx of foreign workers has been encouraged to take on low-skilled jobs, particularly in the construction and agricultural sectors. Thus, the case of Lebanon brings to the fore the structural linkage between employment and migration policies. This lack of a true labour market policy is compounded by the absence of public strategic human-resource planning. The only reform was a 70% increase in the minimum wage in 2007, the first rise since 1996.

3.1 Active Labour Market Policies

In several AMCs, employment policies are limited in practice to active labour market policies (ALMPs). ALMPs aim to correct labour market failures and have been used in Europe and the US to deal with high unemployment and deficient aggregate demand. These polices take the form of direct job creation to restore the employability of workers, labour market training to give workers the skills required by firms, and job brokerage to improve the match between job seekers and vacancies such as employment services that provide better information on vacancies or help to improve the search effectiveness of the unemployed. In several AMCs (notably Morocco and Tunisia, Egypt and to a lesser extent Algeria), ALMP have become the main tool of national employment policies, absorbing substantial financial resources.

Several active labour market policies in the form of employment and training programmes have been set up in Egypt to promote job creation and reduce unemployment. De Gobbi and Nesporova (2005) argue that the ALMPs in Egypt have not always met their set targets since there are skill mismatches between workers and jobs and hence obstacles in job placements; and the credit schemes for self-employment perform poorly. El-Megharbel (2007) argues that ALMPs should be considered as short-term solutions to overcome labour market failures. Consequently, the impact of these policies on job creation should not be overstated. These policies must also be aligned with macroeconomic policies in the global framework of a national employment strategy that aims to increase employment. Assaad and Barsoum (2007) argue that most active labour market programs are primarily provided through governmental or quasi-governmental bodies and suffer from limited efficiency, skewed targeting, and a heavy reliance on international donor support. These programs fail either because they came from the top down, or because they were implemented badly. Many programs are initiated and supported through foreign donor support and are insufficiently institutionalized or integrated into a policy framework. Despite the success of some NGOs, these programs remain limited in scale and depend heavily on grants and, therefore, are not sustainable over the long term. Finally, there have been no systematic evaluations of most of the programs and policies addressing youth employment in Egypt. Studies with pre- and post-intervention designs involving control and intervention groups are very rare. This creates a huge knowledge gap that hinders the learning of lessons and the building of new projects. To conclude, ALMPs have not been effective in creating jobs in Egypt. There have been too many dispersed and uncoordinated policies. There is a need for a more integrated set of policies that address the roots of the malfunctioning of labour markets.

In Tunisia, ALMP instruments are characterised by a wide diversity and an accumulation over the years. This complexity poses problems of transparency, overlapping, coordination and relevance of programmes in relation to the structure of unemployment. There is no systematic and regular process of evaluation concerning their effectiveness and their equity, and they tend to benefit young graduates, whereas the vast majority of the unemployed (75%) have just a primary or secondary education. Only public work programmes have a high orientation towards the unemployed with primary education. Despite a high concentration of unemployment in rural areas in certain regions, ALMPs are focused in urban areas, where all public labour market institutions are concentrated as well. The continuous education component of these policies does not exceed 4.5% of all expenses, and benefits big companies more often than SMEs. Between 1994 and 2004, there was a proliferation of public programmes to assist the transition of young people from school to work or the promotion of self-employment. Often, these programmes led to the creation of a large number of precarious, short-lived jobs. Due to their multiplicity and overlapping, often ALMPs do not distinguish, short of targeting and evaluation, between the assistance dimension (passive employment policies) and a true promotion of labour integration (quality and stability). A recent assessment by the National Consultative Commission on Employment has shown that it is the graduates from prestigious and select universities and colleges who benefit most from these schemes: among the university graduates, ¾ of graduates from the medicine, pharmacy, the ENSI, the ENIT and the HEC benefit from support for their professional insertion. In contrast, less than ¼ of graduates from other science and humanities universities have access to such programmes. Although current ALMP instruments have an overly-limited scope to deal with the core of unemployment, most of them (SIVP and PC50, to give two examples) have a positive impact on the employment prospects of beneficiaries. However, the evaluation showed that one of the main instruments, the Fonds National pour l'Emploi (21-21) has a negative impact, i.e. the chances for beneficiaries to find a job are less than if they had never taken part (see Mahjoub 2009, pp. 28-34).

Also in Morocco ALMPs have been focused on graduate workers and have suffered from dispersion and lack of coordination between the different public labour markets operators. In Algeria, barely 12% of jobs created through ALMPs between 1998 and 2002 became permanent jobs, pointing to another weakness in these programmes.

These results show that, while ALMPs are a necessary ingredient of a comprehensive national employment policy, they can only be effective in the framework of a larger integrated economic policy promoting employment.

3.2 Recent Changes in Labour Market Legislation and Reform Projects

In contrast to the lack of labour market regulation reforms in AMCs in the last few years (see Section 2.2), recent developments as regards national employment policies in several AMCs allow for some hope and lend themselves to further cooperation in this field with the European Union.

In Algeria, a national employment strategy worthy of this name was only adopted in July 2008. The 'Action Plan to Promote Employment and Fighting Unemployment' defines for the first time a coherent policy framework to promote job creating investment and to pursue active labour market policies. Its objectives are as follows: (i) supporting job creating investment; (ii) promoting vocational and technical training; (iii) a multidimensional policy to encourage companies to create employment; (iv) modernizing the labour market management by strengthening labour market institutions, particularly the National Employment Agency; (v) promoting youth employment through a new scheme to support professional insertion; and (vi) follow-up and evaluation mechanisms for the Action Plan by national structures.

In Jordan, the Government *National Employment Strategy* was put together in 2008 by the Ministry of Labour with assistance from the International Labour Organization. According to the *National Employment Strategy* document, previous Jordanian employment policies and programmes were lacking for two reasons. First, they were fragmented and were not comprehensive enough to effectively address labour market dynamics and challenges. For example, employment creation policies were formulated separately from tax policies; now there is a commitment to the objective of 'joining up' employment policy formulation with other aspects of policymaking related to human capital and the economy. These include macro-economic, tax and education policies. Second, previous employment programs were not formulated with full stakeholder participation at all levels. These shortcomings are common to many other AMCs, and extend not only to employment policies, but tax, macroeconomic and trade policies as well.

There are other changes recently introduced in Jordan's labour regulation. In 2008, the Labour Law was expanded to include the previously excluded domestic work and agricultural sectors. Special legal regulations for workers in these two sectors are being formulated. These regulations will set parameters for workers' employment contracts, working hours and for the inspection of their workplaces. It is worth noting that the majority of the estimated 300,000 migrant workers in Jordan are either domestic or agricultural workers. On the other hand, the MoL, in partnership with the ILO, aims to reform the financing of maternity leave benefits. At the moment, maternity leave benefits are financed by employers. This makes women more expensive to hire and discourages employers from hiring them, or means that employers offer women lower wages in order to recoup the cost of maternity benefits. MoL intends to design a centrally-financed system of maternity leave benefits to facilitate the entry of Jordanian women into the labour market.

In Tunisia, the Ministry for Employment is in the last stage of the definition of a new Employment Strategy aiming at restructuring national active labour market policies and focusing on youth employment. The National Consultative Commission on Employment has also stressed the problem of the quality of training and skills of graduate workers, in particular, which explains, in part, the unfulfilled demand for certain categories of employment and the gap between the formal qualification of the unemployed and their actual skills.

Of course, it is far too early to assess the effectiveness of these new policies, but the very fact that employment policies are being reviewed and revamped in this fashion is in itself a positive sign.

3.3 Alternative Strategies and Policy Options for Managing Labour Markets Mismatches

There seems to be a quite a wide consensus on the policies to implement. Recent reports on labour, employment and migration in the Middle East and North Africa region are convergent (see, for instance, World Bank 2009a, Middle East Youth Initiative 2009, but also Section 4.4. or 4.5 of National Background Papers). The following are mentioned in all the reports: improvement in the education system (to bring transmitted skills closer to labour market needs); strengthening of vocational and technical training; support to SMEs; stimulating labour-intensive activities; incentives to private sector firms to hire new graduates and women and also in training for workers through tax rebates; the introduction of unemployment insurance schemes; and the restructuring and extension of social protection schemes.

Integration of policies is the keyword here. The national strategies to enhance creation of good quality jobs require integrating and coordinating public policies in four areas: macroeconomic and investment promotion policies; education and training policies; social protection policies; and labour regulation policies. This coordination should take on an institutional shape, i.e. formal exchange and consultation between the respective competent Ministries at the national level.

There is ample scope for innovation, however, in the policy monitoring and evaluation field. Extensive employment policy assessments should be carried out in every country to begin with, and monitoring and evaluation capacities be substantially strengthened. In this field very little has been done so far in terms of technical assistance for the design, implementation and monitoring of training and employment policies, let alone migration policies. In any case, the contrast with training, assistance and aid ear-marked over the last few years for improving policy-making and implementation in the macroeconomic, financial or trade fields is obvious. In Chapter 7 we advance some concrete proposals along these lines.

On the other hand, the scope for regional co-operation is great. Common objectives and policy-making framework, with a region-wide system of multilateral progress monitoring by each partner, could provide the right incentives to share experiences and best practices, adopt effective policies and follow-up implementation with a technical perspective.

The European experience has shown that in order to fight unemployment efficiently, active and direct employment policies and joint strategies are necessary on a European level, along with growth policies and structural reform. There is no reason why this logic should not be applicable to AMCs, which share with European countries a similar labour market institutional structure, as described in Section 2.2.

4. Outward Labour Migration in Arab Mediterranean Countries

Labour migration has been an important source of employment in all Arab Mediterranean Countries over the last four decades. Neither their societies, nor their economies, including their labour markets, can be understood without considering the impact of outward migration. There are more than 10 million AMCs citizens living in third countries (see Table 4.2.1, where the number of Jordanian and Syrian emigrants is largely underestimated, and Palestine has not been considered). This amounts to more than 8% of their working age population, with higher average levels of labour participation, employment and qualifications than those prevailing in the national labour markets.

4.1 Outward Labour Migration in AMCs: Literature Review

Interest in migration flows in Arab Mediterranean, Southern and Eastern Mediterranean or MENA countries has grown considerably in the last few years. A series of specialized research centres have even emerged, such as CARIM (Consortium for Applied Research in International Migration). So far the literature has to a large extent focused on demographic aspects and migration flows (for a thorough review of literature on this topic, see Schramm 2006). For a comprehensive analysis of migration flows (outward, inward and transit migration) in 10 Southern and Eastern Mediterranean Countries (Arab Mediterranean Countries object of the present Study plus Israel and Turkey), with detailed studies on the demographic and economic, the legal and the social and political dimensions of migration in each country, see the *Mediterranean Migration 2006-2007 and 2008-2009 Reports* (Fargues 2007 and 2009). CARIM has also published more than 200 papers on issues of relevance in this field, in particular circular migration and irregular migration. In the last few years, inward labour migration to AMCs and inter-Arab migration have been subjects of growing interest as well.

In the traditional approach to labour migration, wages and *per capita* national income, or more precisely their differentials, are considered as strong migration drivers. Since evidence from AMCs seems to confirm the value of this theory, it is worth quickly reviewing it. If young i is assumed to face a wage w_0 in his or her country of origin and a wage w_1 if he or she migrates (wage in destination country) and if C is the cost of international mobility – which can be assumed to be fixed, proportional to wage w_0 or decreasing as the level of education increases – the migration rate will equal the probability of $[(w]_1 - w_0 - C)$ being positive (Chiquiar et Hanson 2002). So the migration rate is negatively correlated to average income in the country of origin and to the financial, human and social cost of mobility and positively correlated to average income in the host country. In this way, the analysis of the development of income in AMCs (minimum wage, average wage or per capita national income) and its comparison with that of the potential countries of destination (the EU eventually) provides information, in the first place, on the performance of labour markets in AMCs, as well as on the factors determining the migration choice.

However, the relation between income levels and migration flows is likely to be non linear, so that for a relatively poor sending country an increase in income will have a positive impact on the propensity to migrate, even controlling for the income differential with the receiving country, but if the home country is relatively better off, an increase in income may be associated with a fall in the propensity to migrate (see Faini and Venturini 2008). Quite clearly, most AMCs have left behind the poverty threshold where the financial constraint to migration does operate, but have not yet reached the home bias threshold. This, combined with the increasing wage differential (see Section 2.3), leads to an increase of migration pressures. Interestingly, beyond general surveys on the reasons for migration (see Section 5.1) there is no systematic research on wages of AMC migrants to developed countries.

From a different perspective, centred on demographic prospects and skills profiles, a recent report of the World Bank (2009, pp. 57-61) links increasing European demand for migrant labour over the next two decades, the education and labour force participation of women in the Middle East and North Africa. It argues that MENA countries are currently not well placed to meet increased demand for labour in the European Union. Whether assuming zero migration or a persistence of current migration rates the demand for replacement labour in the European countries is projected to peak in the 2020s. But it will predominantly concern medium-skilled workers who have completed a secondary education. Currently, however, workers from emigration countries in the MENA Region provide a poor match in relation to Europe's needs, as the 15-39 labour force will mainly expand among those who have completed their primary education. If education rates and labour force participation rates stay unchanged, the skill mismatch will become significant. This mismatch will be most apparent in the 2020s, when Europe's potential demand for secondary-educated migrants of roughly 10 million will coexist with a projected potential supply of labour migrant with secondary education of only 0.5 million in MENA. If MENA's emigration countries make efforts to increase labour force participation and education rates significantly, the scope for arbitrage would be much higher. Assuming, as in the scenarios developed for the report, that labour force participation rates and education rates can converge over time to the levels of southern European countries, the match between MENA and the European Union would improve considerably (as the Figure 4.1.1 clearly shows). Between 2005 and 2050, the MENA emigration countries would produce a net increase of 20 million people with secondary education and 10 million people with tertiary education. This scenario's outcome will depend partly on the success of MENA countries in improving participation rates for women. In Section 6.3 we take a different approach, based on Venturini, Fakhoury and Jouant 2009, to conclude that a matching opportunity does indeed exist.

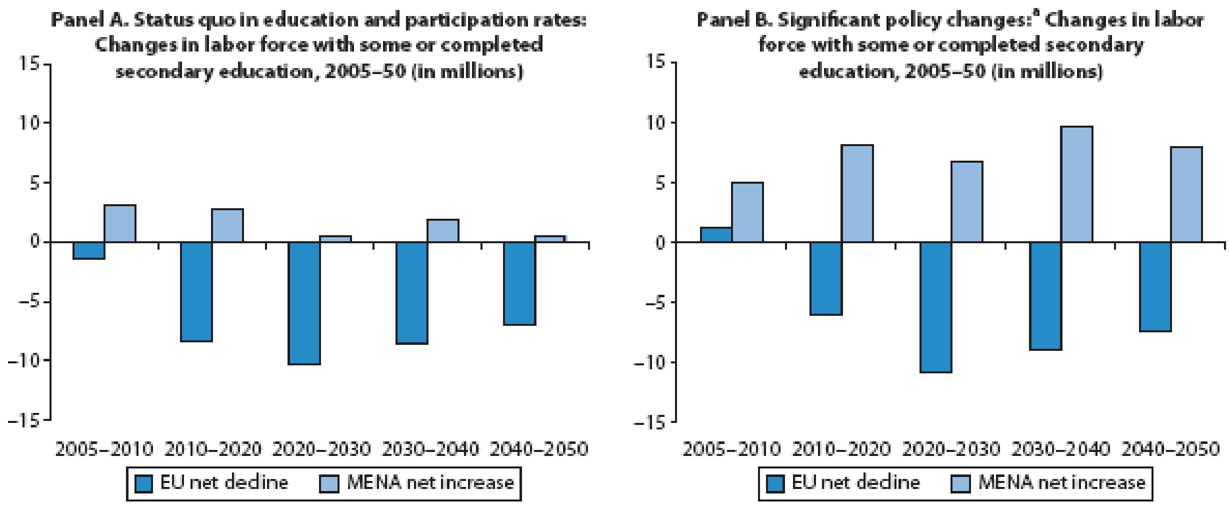


Figure 4.1.1. Skill Mismatch With and Without Policy Reform in MENA Countries

Source: World Bank (2009)

What is clear is that the sheer size of employment creation in the AMCs implies that migration cannot provide a solution to the AMC unemployment problem. The aforementioned World Bank report (World Bank 2009a) is very clear in this respect: "Migration is not a panacea for sluggish job creation in MENA countries or for an aging European population, but it could form part of the policy approach to address these challenges". However, many of the policy actions and institutional reforms required to become more competitive in the global labour supply market – specially enhanced education and vocational training systems, the increased labour participation of women – correspond with those needed to foster private sector job creation and labour productivity growth at home.

A field where analysis is sorely lacking is that of migration policies in countries of origin. The ILO/IOM/OCE 2007 Handbook provides a general framework for policy-making (pp. 37-39) and labour policy options to improve labour migration outcomes are discussed in Chapter 4 of the World Bank report (2009a, pp. 69-93).

4.2 Outward Migration Flows: Extent and Characteristics

The lack of reliable and updated data on outward migration flows means that it is very difficult to draw a general picture of this phenomenon in AMCs. Some countries, like Syria, do not provide statistics for outward migration, and AMC migration to the Gulf States (mostly temporary) is largely unrecorded. So data are fragmentary, and it is impossible to construct a comprehensive, accurate and reliable table showing the size of AMC outward labour migration, their destination, educational profile….We are forced to work with data from different, inconsistent sources, often corresponding to different years for each country, or with fragmentary data from destination countries. As noted in the Thematic Background Paper (Marchetta 2009), "most widely-quoted figures on emigrants are immigration-based, i.e. obtained through the aggregation of data gathered in the destination countries. Such an approach can give rise to substantial discrepancies with emigration-based statistics, which – in the case of Egypt - can even be 246% higher than data gathered in the countries of destination (Fargues, 2007)". Available figures (summarized in Table 4.2.1) should be considered as minimum estimates, while actual levels could be significantly higher.

In any case, labour migration has played an important role, both economically and socially, in all AMCs in the last three to four decades, with Morocco and Egypt (with close to three million each) amongst the top 20 countries in the world with the largest number of emigrants. According to World Bank 2009a figures, on average in 2005 the Middle East and North Africa countries had 3.9% of their total population as migrants abroad (a higher proportion than the 2.9% world average). As a percentage of the total population, apart from Lebanon (where emigrants make up 17% of their country's population), migrants from the Maghreb amount to 5.5% of the total population, and move predominantly towards European OECD countries, while migrants from the Mashreq are estimated at 3.3% of the population, and approximately two thirds of them reside in the Gulf and other Arab countries. Overall, roughly 56% of MENA migrants live in EU countries, 32% in Gulf and other Arab countries and a mere 12% in other countries, mainly North America and Australia[13]. In Europe, around four-fifths of MENA immigrants come from the Maghreb countries, compared with less than 10% in the case of Australia and North America, where MENA immigrants come mainly from Mashreq countries.

Cross-country differences in terms of the geographical distribution of migrants are also related to the predominant pattern of migration: while migrants towards the Gulf Countries tend to move on a temporary basis, migration towards the OECD is mostly on a permanent basis (World Bank, 2008a). These differences in geographical distribution and in the prevailing length of the individual migration experience have far-reaching consequences on the impact of migration on the labour markets, Characteristics of the labour markets at destination are a relevant mediating factor in shaping the impact of migration upon the countries of origin. This also entails that the empirical relevance of the various potential channels of impact which will be highlighted in the following Chapter are likely to differ across the Maghreb-Mashreq divide. Another relevant feature is the fact that migrants from AMCs are predominantly male, although migration flows from Maghreb countries have recorded an increasingly important role for women and children (Schramm, 2006b).

13 In World Bank 2009, pp. 13-26, the shares stated are 42% in the EU, 45% in the Gulf and other Arab Countries and 13% in North America and Australia. This is due to the inclusion of the Palestinian diaspora, most of which lives in other Arab countries.

Table 4.2.1 Outward Legal Migration Stocks in Arab Mediterranean Countries by Groups of Countries of Destination (a)

Destination countries / Countries of origin	Year	Arab Countries	Europe	Other Countries	TOTAL
Morocco	2007 (b)	281,631	2,837,654	173,314	**3,292,599**
Algeria	1995	66,398	991,796	14,052	**1,072,246**
Tunisia	2008 (b)	153,256	873,947	30,594	**1,057,797**
Egypt	2006	1,928,160	106,398	381,400	**2,415,958**
Jordan	2008 (c)	141,202		36,432	**177,634**
Syria	2000 (d)			130.178	**130.178**
Lebanon	2005 (c)	187,219	109,104	258,487	**554,810**
TOTAL	**(e)**	**2,757,866**	**4,918,899**	**1,024,457**	**8,701,222**

a) Estimates by the Palestinian Central Bureau of Statistics indicate a number of 4,707,471 Palestinian emigrants, but this includes all the Palestinian diaspora, the vast majority of which was born after 1948 and can hardly be considered as migrants. Hence we have removed Palestine from this table.

b) National Background Paper (Mahjoub 2009).

c) National Background Paper (Saif and El-Rayyes 2009). Due to missing statistics, "Other countries" indicates the figure of Jordanian immigrants in Database on Immigrants in OECD Countries. According to some estimates, Jordanian emigrants could amount to 500.000.

d) Syria has no official statistics for its nationals abroad. The figure of the Database on Immigrants in OED Countries has been included in the "Other Countries" column, but the total number of emigrants probably exceeds 1 million.

e) If Palestinian, Syrian and Jordanian migrants not considered in this Table are accounted for, the total number of AMC migrants will easily exceed the 10 million mark.

Source: Fargues (2009) and National Background Papers based on national sources.

In the Egyptian economy, international migration has played an important role over the last three decades. Egypt has been a major labour exporter since the early 1970s, exporting both educated labour (mainly to the Gulf States and Libya, but also to the US, Canada and Australia) and uneducated labour (to Jordan, Lebanon and Europe) and becoming the largest labour exporter in the MENA region in absolute terms. In 2005 according to CAPMAS there were around 2.8 million emigrants, 71% of whom were temporary and 29% permanent; 95% of temporary migration was to Arab countries, and less than 4% to Europe. According to the 2006 Census, there were 3.9 million Egyptians abroad in that year. This is 8.6% of the working-age population. According to the ELMPS 2006, 4.8% of households had a member of the household working overseas. However, it is important to remember that this figure underestimates the real number since it does not include migrant *households* who are currently overseas; i.e. it does not include migrants with their families currently overseas.

In Lebanon, it has been estimated that there was a stock of almost 560,000 first generation migrants in 2005, i.e. close to 20% of the working-age population. It is also estimated that somewhere between 15,000 and 20,000 people emigrate every year (Characteristics of Emigrants, 2000), around the same number of net new entrants to the labour market (which reveals a rapidly increasing migration rate).

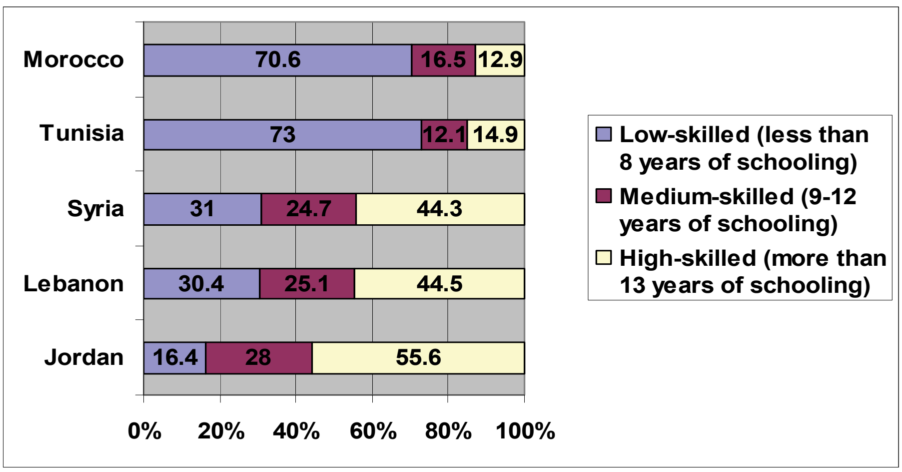
Most migrants are highly-skilled (more than 10 years of schooling), males (80%) and young (below 35). Today, just under half of the country's population has one or more family members living abroad (46.2%), these having emigrated between 1975 and 2000.

In other countries, the relative size of labour migration to the working age population is smaller, but nevertheless substantial: almost 10% in Jordan, 8.6% in Morocco and less than 5% in Syria, for instance. Tunisia is a special case where the net migration balance was positive for the period 1990-2007 (i.e., more immigrants or returning emigrants than emigrants), although after a year-to-year positive balance between 1990 and 1999 (of between 3000 and 9000 net entrants a year, with a peak in 1990 of 84,974 due to the first Gulf War), net outward migration has resumed, with a growing negative net balance over the period reaching the 20,000 a year mark in 2006-2007 (a migration rate of 23% of new entrants to the labour market) (see National Background Paper, Mahjoub 2009, p. 39).

In any case, although statistics for flows are even more difficult to find than for migration stocks, there is evidence of increasing migration rates across AMCs. Taking the current migration rate of an average 8% as a minimum level of probable migration, the increase in the working age population of AMCs will translate into a minimum yearly migration flow of 200,000 persons between 2010 and 2020 (i.e., 2 million new AMC migrants over the period; see Figure 1.1.1). But there is strong evidence of increasing migration rates across AMCs in the last decade (23% in Tunisia, close to 100% in Lebanon), so that this flow could easily triple to 6 million new migrants over the next ten years if migration rates reach, for instance, a level of 24%, a level which is more consistent with recent evidence. The World Bank (2009a, p. 56) estimates a substantially higher level of migration from AMCs, projecting it at 1.3 million migrants a year between 2010 and 2020 if current migration rates are maintained.

As for the educational profile of AMC migrant workers, the share of highly-educated migrants among all migrants is smaller for MENA migrants as a whole than for other migrants in OECD countries. And the highly educated immigrants from MENA are concentrated in Anglo-Saxon countries, where the share of MENA immigrants is relatively low. Adams (2006) shows evidence of a clear difference in the educational profile of Maghreb and Mashreq emigrants (to OECD countries): whereas most of Syrian, Lebanese and Jordan emigrants are highly-skilled (more than 13 years of schooling), in the case of North African countries more than 70% of registered migrants are low skilled (See Figure 4.2.1). Although this data is outdated, more recent evidence tends to confirm this pattern: as shown by Figure 6.3.1.1, skills levels of non EU-born workers in the EU in 2008 (both for recent immigrants and for those with more than 7 years of residence) are the lowest of any of grouping of countries (with the exception of Turkey) for North Africa, whereas skill levels for Near and Middle Eastern migrant workers are well above average.

Figure 4.2.1: Distribution of emigrants from the MENA to OECD by level of education (2000)



Source: Adams (2006)

If we take the extreme case of Morocco, around a third of Moroccan migrants in the EU do not have any formal qualification, and another third only a primary education certificate. But there are important differences across countries of residence. The most critical situation is that of Spain and Italy, countries of recent Moroccan immigration. In Spain, around half the Moroccan immigrants have no formal qualification; in Italy, this percentage is 43.6%. However, in the case of Morocco there is evidence of inter-generational progress among Maghreb immigrants in Europe (see National Background Paper, Jaidi 2009, pp. 73-75).

Reasons for Migration

Evidence from the region confirms the common sense intuition pointing to employment prospects as the main driver of migration, although wages and living conditions tend to play a greater role than unemployment as such. A field survey was carried out by the Egyptian Ministry of Manpower and Emigration to determine the push factors in Egypt as identified by current and potential migrants. The results of this survey indicate that push factors in Egypt are overwhelmingly economic. Egyptian youth regard migration – legal or illegal – as a possible way to escape poverty and unemployment. With respect to the reason for migration, the study indicates that the main reasons behind migration are the low wages and salaries in Egypt compared to Europe, bad living conditions and the lack of job opportunities in Egypt, especially among new graduates. An important factor that plays a major role in stimulating migration streams to Europe is the wealth of successful migrants and return migrants. Remittances of Egyptian migrants who work in European countries are important factors that stimulate a continuous stream of migration. Potential migrants claim that the "*savings of one-year work in Europe is more than a lifetime salary in Egypt"*. The current stream of Egyptian irregular migration to Europe started on the eve of the 21st century with massive number of newly-graduated and poorly-educated unemployed youth engaged in irregular migration to Europe either across the Mediterranean Sea via Libya or by over staying on tourist Schengen visas. Zohry (2008) argues that the main reasons behind this new type of migration are not related to the tightened policy adopted by the European Union, but instead to: (i) unemployment: the increasing severity of unemployment is one of the main push factors that stimulate a strong irregular migration stream to Europe; (ii) associated with unemployment is the difficulty for Egyptian youth to find employment opportunities in the Arab Gulf countries due to the competition they face there from the cheap South East Asian labour now arriving in massive numbers; and (iii) geographical proximity and the ease of travelling to Libya where most of the migrant boats to Europe set-off.

Another survey carried out in Morocco shows that reasons stated for migration are predominantly (between 2/3 and 3/4) related to work and wages (National Background Paper, Jaidi 2009, pp. 79-81).

In any case, the National Background Papers show that the main push factor for migration is not unemployment as such, but rather the large (and in most cases growing, see Section 2.3) wage and income differentials. So wage differentials, not unemployment as such, are the main drivers of migration. This seems to be confirmed by the fact that, in Lebanon, a significant majority of those who departed were people aged between 25 and 29 who were in employment when they made the decision to leave the country.

In Algeria, the survey carried out by Hammouda (2008) does not relate directly to this issue, but nonetheless gives us an insight into how young people represent migration and how they project their future through it. It demonstrates that unemployment and the lack of employment prospects are not the main reason given by young people. The results suggest that the propensity to migrate depends, in the first place, on belonging to a migration basin (agglomeration effect), sex (men are more inclined to migrate than women), instruction level (the more educated a person, the more he or she wishes to migrate) and living conditions. For Hammouda, the high cost of migration explains why it attracts mainly graduate workers, and why the unemployed are excluded. However, the most original result of this study is the fact that the individual situation of a person in the labour market (employee, unemployed or inactive) does not seem to be significant in terms of propensity to migrate.

Besides that, as reported in Section 4.1 above, the income inequalities between countries of destination and countries of origin of migration have a non-linear impact on the rate of migration: when inequalities are relatively small initially, an increase in those inequalities will cause a growth in migration rate, up and to a threshold beyond which further increases in inequality have a negative impact on migration. Interestingly, income and wages differentials between the EU and AMCs have increased substantially since the 1980s, but have stagnated or have only increased marginally over the last few years (see Section 2.3).

Destination of Migration

Overall, AMC migrants head mainly for Gulf States and other Arab countries (45% of total AMC migration and the majority destination for Mashreq countries), Europe (another 42%, predominantly from Maghreb countries) and to a lesser extent to the US, Canada and Australia (the remaining 13%; they attract mainly skilled migrants from AMCs). Of these migration streams, AMC migration to Gulf countries is by far the least studied.

However, traditionally migrants from the AMCs have followed two clearly distinct patterns, with Maghreb migrants going mainly to Europe and in particular to France and the Mashreq ones going mainly to Arab and non-European countries. Recent, more educated outflows are changing direction with an increase of emigration from the Maghreb countries toward other European countries and Canada and the US and also some Arab countries. This is the case of Algerian migrants[14] where UK (41%), US (53%) and Canada (61%) have the largest share of educated migrants. The same is true for Tunisian migrants; this country has experienced an increase in the education of emigrants and emigration to Arab countries: the share of emigrants in Arab countries has increased from 12% in 2005 to 25% in 2008.[15] A similar pattern applies to Morocco.[16] As a consequence, four fifths of AMC immigrants to Europe come from the Maghreb countries; in particular, 85% of Algerian labour migrants are established in the EU, mainly France. Of these, only 10% have university degrees, in contrast to 84.1% or 72.8% of Algerian migrants to, respectively, the US and Canada. More than 85% of Moroccan migrants are also established in the EU, distributed in France (close to 40% of the total), Spain, the Netherlands, Italy and Belgium. Once again, the vast majority of them (79% in France) have primary or no education, whereas around 70% of migrants to North America have a university degree (World Bank 2009a, p. 96). In the case of Tunisia, close to 70% of total migration is established in France.

Mashreq emigration to the Gulf has a long tradition. At least 80% of Egyptian migrants work in Arab countries, where at least 40% of them hold highly-skilled jobs17. An interesting finding is that Egyptian migrants in the Gulf countries and in North America are more skilled than Egyptian migrants to Europe, and 55% of highly-skilled Egyptians going to OECD countries migrate to North America.18 However, in the last few years there has been an increase in Egyptian migration to Europe. As argued by Zohry (2008) Egyptian migration to Europe is different from other migration streams that target the same destination: Egyptian migration is mainly male-dominated and temporary labour migration in general, while other streams involve males and females who usually intend to stay

14 National Background Paper for Algeria (Bouklia-Hassane and Talahite 2009). Also H. Khelfaoui (2006) shows how much more skilled are the Algerian immigrants in the US and in Canada as well as the distribution of immigrants coming from the Middle East and North African (MENA) regions where the skill positions dominate over the unskilled positions.

15 National Background Paper for Tunisia (Mahjoub 2009).

16 National Backgroung Paper for Morocco (Jaidi 2009).

17 National Background Paper for Egypt (Wahba 2009).

18 Nassar 2008, Table 6.

in the destination countries. Contemporary migrants to Europe are predominantly low-skilled males who suffer poverty and unemployment to the extent that one may call this new stream of migration a *"migration of the poor"* (see Zohry 2008). Examining the educational level of permanent Egyptian emigrants a very interesting pattern of emigration by education emerges, even though these figures refer to permanent migrants only. First, 96% of all highly-skilled Egyptian migrant workers reside in Arab countries and only 2% reside in European countries. At the same time, the majority of Egyptian workers in Arab Countries, 71% of all Egyptian workers, have intermediate education or below.

The difference is striking too in the case of Lebanon. Thus, 46% of all migrants are in the US, Canada and Australia; 19% in Europe; 9% in other southern countries and 27% in the Gulf countries, and 45% of emigration from Lebanon is highly skilled. Most Lebanese migrants go to the Arab Gulf countries, where job opportunities for skilled multi-lingual individuals have grown quickly in the past decade. The US, Australia and Canada follow as top destinations, capturing respectively 19, 15 and 12% of Lebanese migrants. These countries, together with Syria, absorb 80% of Lebanese labour migration. Migrants to EU countries have a somewhat smaller share, not exceeding 15% of total Lebanese migrants abroad.

Overall, only 15% of Jordan-born OECD workers reside in European Union countries. In absolute terms, this represents 5,523 workers which is a very small number when compared to the number of EU-based workers born in Morocco (655,716 workers[19]), Algeria (522,545 workers) or even Egypt (63,683 workers).[20]

In short, it can be stated that, in general terms, the main destination countries for skilled migrants from the AMC countries are the US, Canada and the Gulf countries, where the skill premium is relatively high. The wide difference between AMCs and European incomes might be a pull factor for AMC emigration to Europe, yet when compared to average incomes in the Arab Gulf region; Europe becomes less attractive as a destination.

Circular and Temporary Migration

As stated above, in contrast to other AMCs, Egypt provides a unique case where the vast majority of migrants tend to be temporary. This is due to a large extent to the Gulf Countries' policy of not allowing the settlement of labour immigrants. The risk of this pattern is a higher degree of vulnerability to economic crisis in hosting countries, such as the one that has hit Gulf countries in the last few months. Indeed, emigration to the Gulf States tends to be affected by oil prices and political conditions in the region. The period 1992-1997 witnessed an upward trend in Egyptian emigration after a slowdown as a result of the Gulf war in 1991. The period 1998-2000 witnessed another downward trend due to the slowdown in the world economy as a consequence of the collapse of the East Asian financial markets in 1997. However, by 2005-07 estimates show a bounce back. The 2008 global financial crisis is already causing a return flow of migrant workers from Gulf countries, mainly to Egypt, Jordan and Lebanon (see section 2.7).

As Fargues points out (2009, pp. 28-31), many other forms of circular migration are common in and among AMCs, including Syrian workers in Lebanon, Egyptian farmers in Jordan and in Libya. Indeed, circular and temporary migration tend to play an important role in the framework of legal migration schemes, in particular to the EU. Both EU countries and AMCs are showing a growing interest in this kind of arrangements, and a series of bilateral agreements have been signed in the last few years to organize flows between Spain and Morocco[21], France and Tunisia[22] and Italy and Egypt (signed back in

19 Germany has been excluded from this figure for purposes of comparability, though the number of Morocco-born workers in Germany is available from DIOC.

20 OECD Database on Immigrants in OECD Countries.

21 Agreement signed in 2006 between the Spanish Cartaya City Council and the Moroccan ANAPEC (Agence Nationale de Promotion de l'Emploi et des Comptences) and implemented with the support of the Aeneas Programme by which the latter recruits on behalf of the former a yearly number of female workers (13,600 in 2008) for the harvest of strawberries in Huelva,

2004 to facilitate the legal entry of Egyptian migrant workers – see Roman 2008. However, an assessment of the working and impact of these schemes has not yet been carried out, and administrative procedures seem to be a permanent hurdle for their success. In May 2007, the European Commission published a Communication on “Circular Migration and Mobility Partnerships between the European Union and Third Countries” (COM(2007)248final) which advocated the “incentives encouraging the return of seasonal or temporary migrants and favouring the truly circular character of migration”. This opened up the possibility of backing circular and temporary migration schemes at EU level.

In any case, the number of legal migrants from AMCs recruited through them remains marginal in comparison with the total volume of migration from AMCs to the EU (see Fargues 2009, p. 21). Venturini (2008) and the Thematic Background Paper on EU Migration Policy (Venturini, Fakhoury and Jouant 2009) show that the migratory potential due to the mismatch between supply and demand of labour in AMCs is too large to be solved by repeated migrations. Using a stock-flow model, it calculates (see Table 4.2.2) the absolute excess yearly supply of labour (AES) in a country as the difference between flow supply (FS, first-time entries into the labour force, determined by working age population and participation rates; compare with data in the first row of Table 1.3.1) and flow demand (adding together replacement demand – RD, exits from the labour force – and additional demand, AD, additional jobs created by the national economy) and subtracting the traditional level of (permanent) annual emigration outflows (M). In AMCs, this absolute excess supply of labour is too large to be solved through repeated emigration. This would, for example, mean that each year in Morocco 128,000 and in Egypt 72,000 workers would leave temporarily to work abroad, and if economic conditions remain the same, the following year the same people would leave temporarily for a second year abroad and the new entrants for the first time with a total of 252,000 for Morocco and 144,000 for Egypt and so on. For the four AMCs considered in the model, this would mean close to half a million additional candidates for circular migration each year.

Table 4.2.2 Absolute excess supply of labour in AMCs

Annual Labour Market Flows								
		1	2	3	4=2+3	5=1-4	6	7=5-6
	Year	FS Flow Supply	RD Replacement Demand	AD Additional demand	Total Flow Demand	Internal Excess Supply	M Emigration outflows	AES Absolute Excess Supply
Tunisia	2005	113,000	35,000	48,000	83,000	30,000	4,113/9,000	26,000/21,000
Morocco	2006	310,000	92,000	30,000	122,000	188,000	60,000	128,000
Egypt	2006	938,000	150,000	624,000	774,000	164,000	92,811	72,000
Algeria	2005	357,000	37,000	12,000	49,000	308,000	42,000	266,000
Population data, Labour force data, Exit data: ILO statistics. Additional demand CARIM data Migration data CARIM Report 2006-7								

Source: Venturini, 2008.

Spain, for a daily gross wage of 35 euros. (See Moreno 2009). In 2009, due to the crisis, the programme will be discontinued, and only Eastern European workers and Spanish unemployed will be recruited.

22 The agreement between both governments in 2008 in force on July 1st 2009 provides for 9,000 multiple entry visas a year for highly skilled potential migrants (3,500 for potential employees, 2,500 for “seasonal workers”, in particular in agriculture, and 1,500 each for “talents and skills” and for “young professionals”).

In conclusion, circular and temporary migration cannot be considered in any way a panacea to solve the twin challenges of employment and migration between AMCs and the EU, but they are part of the complex equation and they should be explored as such to ensure the appropriate legal and institutional schemes are put in place.

Temporary Migration of Public Employees in Egypt

One channel which has facilitated the temporary migration of public sector workers has been Law no. 73 which was passed in 1971. This law allowed an Egyptian worker who emigrated and had been working in the government or in public sector, and whose resignation had been accepted for the purpose of permanent emigration, and who returned back home within two years of when the worker's resignation was accepted, to be re-appointed at the entity where he/she had been working before emigration if the worker applied for this within three months of his/her final return. A worker shall be appointed to his/her last post, if it is still vacant, or to another similar post. A person whose emigration duration exceeds two years may be reappointed, if the worker meets the conditions required for filling the post. In such case, the said worker shall be exempted from the examination procedures or the contest required for the filling of the post. In practice, this law allowed many public-sector employees to emigrate for up to two years and keep their public-sector jobs, in particular in the 1970s and 1980s. In 2006, 40% of returnees went back to the public sector.

National Background Paper on Egypt

Jackline Wahba (2009)

National Migration Policies

Despite an increasing interest by AMC authorities in the management of migration (Fargues 2009, p. 19), one common feature of AMCs is still their lack of migration policies or, in several cases, *passive* migration policies. Migration has often been used as a substitute for employment creation in the local labour market, a source of welcome foreign currency and a release valve for social and labour market tensions. Indeed, encouraging outward migration has been one of the main strategies for decreasing unemployment over the past 35 years at least in Jordan, Lebanon and Morocco, where overseas employment has become an integral part of national development strategies. In Egypt, the government's approach towards international migration was, for a long time, one of *laissez-faire*. In 1996 the responsibilities of the Ministry of State for Emigration Affairs was transferred to the Ministry of Manpower and Employment, which was later re-named the Ministry of Manpower and Emigration. The MOME currently provides information to potential migrants about jobs and to existing migrants about various facilities.

The extreme case is Algeria, where there is no migration policy as such, and the phenomenon has been largely ignored by public institutions since the halt to legal migration imposed by France in 1974. In fact, migration continues to be concealed: there is no particular financial scheme to attract remittances, no statistics, no public institution charged to monitor this issue, no migration policy as such. According to Collinson 1996 and Fargues 2004, this ambiguous stance regarding emigration and its expatriates is largely due to a contradiction between internal policy stakes – containing unemployment and therefore favouring emigration – and external policy stakes – opposing what it considers neo-colonial policies of labour imports. However, the political approach to migration is evolving, and in 2009 some new institutional developments are to be noted: the creation of a Department for Emigration at the Ministry for Employment and National Solidarity as well as the establishment of the Consultative Council of the National Community Abroad.

Morocco is the only case among the AMCs where the outline of a comprehensive migration policy seemed to emerge after 2007. There was the legal reform of the Moroccan Nationality Code to grant Moroccan nationality to the children of Moroccan women with non-Moroccans; the creation of the Council for the Moroccan Community Residing Abroad (CCMRE), a community of 3.3 million residents registered in Moroccan consulates abroad; the creation of a Ministry in charge of the Moroccan community residing abroad; and the presentation of a Five Year Plan to Promote the Situation and Interests of Moroccans Residing Abroad in June 2008. This has been complemented with the signing of bilateral agreements to organise legal migration (see description of the Spain-Morocco agreement in footnote 21).

This notwithstanding, given the sheer size of migration as an economic flow in AMCs, there is an acute need for articulated migration policies to optimize their impact on national labour markets and ultimately on development.

5. Elements for Analyzing the Impact of Migration Flows on National Labour Markets

The literature on the developmental impact of migration is enormous and growing. Indeed, the prevailing theory has seen a marked evolution. At the end of the 1990s, empirical research and policy debates revolving around the effect of emigration on the economic development of origin countries received additional impulses. Up until the 1990s, the classical economic theory prevailed, according to which migration – by reducing the supply of labour and unemployment and inducing remittances transfers to the countries of origin – contributed to their development, reducing income disparities and ultimately rendering migration unnecessary.

Remittances were considered to be beneficial both for the aggregate economy and for the migrant's family (Kapur 2005, Adams and Page 2005). It was commonly argued that remittances alleviated poverty, increased schooling levels and reduced child labour, and that they were useful for the sending country's balance of payments. Moreover, the debate concentrated on the likely unproductive use of remittances, mostly employed in consumption and for buying a house or a piece of land, and only partially for productive investments. Policy interventions tried to favour the allocation of remittances in more productive assets by granting loans to start a business or to buy a house even before the migrant's return to the origin country.

In the last few years, a different approach has come to predominate, according to which migration causes brain drain and even labour shortages in certain sectors, and remittances boost private consumption and demand (which of course contributes to job creation), but at the same time distort markets, cause the Dutch Disease (through the overvaluation of national currency, with productive resources being transferred from traded to non-traded sectors), increase income inequality and reinforce the informal economy. Moreover, the presence of remittances reduces the incentives for participation in the labour market and hence gives rise to a *rentier* mentality in which reward is not a function of productivity or work in general (see Chami *et alia* 2005 and Chaaban & Gebara 2007 for the case of Lebanon).

The "brain drain-brain gain" literature (Stark, Helmenstein and Prskawetz 1997, 1998; Mountford 1997; Beine M, Docquier F., Rapoport H., 2001, 2003) shows how the increased probability of successful emigration among the more educated stimulates investment in education among potential migrants. The result is an increase in the number of educated workers in the origin country. While part of this labour force will eventually migrate, a more educated labour force, beneficial to the growth and long-term development of the country, will remain in the country.

Nevertheless, it is noteworthy that whereas empirical evidence on the negative impact of remittances exists, evidence revolving around the brain gain effect is very limited (Faini 2006). Thus, a widespread view is that migration is good for the migrant and for his/her close family because it alleviates poverty, but it is not positive in the long run either for the migrants' relatives or for the country. By creating a subsidized economy, it forces future workers to follow emigration patterns as employment prospects in the origin country remain slight. For a general review of research into how emigration affects sending countries, see Docquier and Rapoport (2008) and Hanson (2008).

It is the socioeconomic environment of countries of origin, and to a certain extent of hosting countries as well, that determines which theoretical approach is relevant. Correlation between migration and development is certainly highly dependent on the place of each country in the development scale. As far as the AMC region is specifically concerned, in 2006 the United Nations organised in Beirut, Lebanon, an Expert Group Meeting on *International Migration and Development in the Arab Region: Challenges and Opportunities.* The contributions to that meeting review all the relevant topics in this respect (see, for instance, Gallina 2006).

5.1 Effects of Outward Migration on Labour Markets in AMCs: Literature Review23

As for the interaction between labour markets and international migration, the literature on how immigration affects labour markets in receiving countries is enormous and sophisticated (see Aydemir and Borjas 2007 for the US and Canada and Lumpe 2007 for a general review). In contrast, the research on how emigration affects the labour markets in sending countries in comparatively small. Indeed, very little is known about the impact of emigration on the AMCs labour markets. Research so far has focused on the macro- and microeconomic impact of remittances based on the analysis of the pattern of expenditure. However, the size of labour migration has reached a level where it is not possible to ignore anymore the impact it has on education strategies and investment, labour market participation, local wages and other aspects of local labour markets.

Emigration was seen as a safety valve reducing the supply of workers in the 1970s and 1980s. According to some authors (Nassar 2005), in certain countries emigration has reduced unemployment rates. They add that if all emigrants return unemployment would shoot up. However, little is known about the impact of emigration on labour demand, incentives to work, wages, contracts, female labour supply, or young people's labour supply. But, with migration levels from AMCs likely to peak at more than half a million a year between 2010 and 2020 if current migration rates are maintained, the importance of this economic development for their labour markets can hardly be exaggerated.

A first order effect of migration is, indeed, its impact on the labour supply of the countries of origin (and hence reducing unemployment in labour abundant countries such as AMCs), as shown in the first row of Figure 5.1.1. However, the high degree of segmentation of AMC labour markets (see Section 2.2) reduces the impact of migration on unemployment levels. Beyond that, the impact of the different stages of migration on education strategies and hence skills availability, incentives to work, wages and labour demand is potentially significant. Indeed, outward migration affects national labour market in many ways and through many channels. Figure 5.1.1, based on existing literature and economic analysis, undertakes the systematization of those effects from a theoretical point of view, reviewing the positive, negative or neutral or contradictory effects on the performance and the structure of labour markets of different stages of migration (Prospect to migrate, Actual migration, Remittances or Return Migration) through nine different channels (including labour supply and demand and the degree of informalization of the economy, as well as its factor endowments); this holistic approach is more relevant than the frequent limitation of the analysis to the impact of remittances.

This notwithstanding, effects related to social capital (and so-called social remittances) have been deliberately left outside the analysis, although they are implicitly considered as part of the positive effects of return migration24. The same applies to the impact of migration networks (which mainly affect the prospects for migration and whose effects correlate with the level of migration). Finally, the level of unemployment as such has also been left outside the Table, since it is determined through some of the channels appearing in the Table, such as the labour participation rate (a decrease in this rate reduces unemployment) or reservation wages (an increase in the minimum wage a worker is ready to accept in order to work will increase the unemployment at prevailing wages). So Figure 5.1.1 allows us to infer, for instance, that the prospect to migrate increases reservation wages (something which is empirically observed in Lebanon, for instance), or that remittances may decrease the labour

23 Literature review throughout this section draws heavily from the Thematic Background Paper on The Impact of Migration on the Labours Markets in Arab Mediterranean Countries: A bibliographical Review, commissioned for this Study (Marchetta 2009).

24 They are considered, however, in the Thematic Background Paper (Marchetta 2009) and in the National Background Paper for Algeria (Bouklia-Hassane and Talahite 2009).

participation of their beneficiaries (often women). However, as Section 5.2 will show, the evidence collected in AMCs does not always confirm those effects; so the Figure mainly provides a first analytical framework for further research into those effects.

Two conclusions can be drawn from an overview of Figure 5.1.1. First, the more the migration process extends through its different stages (from the prospect to migrate or the actual migration to the transfer of remittances through return migration), the more positive the impact it has on labour markets. This highlights the interest of promoting return migration from the perspective of the countries of origin. Second, the effects of migration on labour markets are complex and often contradictory, so it is not possible to draw any conclusion on its net balance. It depends very much on the context and the characteristics of migration. This calls for a differentiated policy mix.

Figure 5.1.1 Synthetic table of the effects of outward migration on labour markets

Effects on labour markets \ Migration stages			Prospect to migrate	Actual migration (permanent; temporary)	Remittances	Return migration
Supply side	Factor Endowments	Labour supply (L)	-	-	-	+
		Skills supply (H) (brain drain/gain)	+	-	+	+
		Capital supply (K)	=	=	+	+
	Behaviour	Education (H) (skills acquisition)	+	=	+	+
		Labour participation (L)	-	=	-	+
		Wages (reservation wages)	+	+	+	+
Demand side	Consumption patterns	Labour demand	-	+	+	+
	Investments, entrepreneurial activities	Labour demand (K)	-	-	+	+
Structure	Informal employment		=	=	+	=

L = Labour supply; K = Capital; H = Human Capital

As far as empirical evidence in the literature is concerned, Jordan provides a good example of the relevance of the labour market impact of migration flows, as – according to Chatelard (2004) – Jordanian economic development is closely intertwined with the prevailing dynamics of international labour mobility. This was true in particular in the 1980s, when it was estimated that 42% of the labour force was expatriated, and that such a massive outflow of the labour force led to a substantial decline in unemployment. When, in the early 1990s, a large number of Jordanians were repatriated due to the first Gulf war, the country experienced a 10% increase in its population, putting great pressure on infrastructures, public services and housing, and unemployment climbed up to 30% (De Bel-Air, 2008).

By the same token, international migration has always been an essential route of escape for the excess Palestinian labour supply: the restriction on entry into the Israeli labour market after the beginning of the second *Intifada* created a sharp rise in unemployment, which increased from 13% to 29% between 1999 and 2006 (Hilal, 2007) – see box on this topic in Section 5.2.

As far as the large countries of the Arab Mediterranean area are concerned, Ramamurthy (2003) finds that Egypt is the only country in his sample where emigration has a significant effect on employment. Nassar (2005) argues that – notwithstanding data limitations and despite the fact that the best workers rather than the unemployed migrate – the direct impact of migration on the Egyptian labour market can be gauged from what happened during the Gulf crisis, when Iraq and Kuwait closed their borders, and many Egyptians were repatriated. Finally, it is important to underline that the labour market effects of migration need not be confined to the areas of origin of the migrants, as international migration is closely linked to internal movements of people: it often induces the internal relocation of the labour force in a country[25].

But other effects (such as the effect on wages, the availability of skilled labour, participations rates…) are more difficult to gauge. Take, for example, the net impact of remittances on the incentives to work or to invest in education (the possibility of migration raises the expectations of students and their parents, encouraging increased investment in education). Analysing differences across regional job markets or basins in the same country could give valuable indications by correlating differences in labour market performance with the level of migration in each of them (controlling for other factors to take into consideration), and hence on how migration affects labour markets.

So the National Background Paper for Tunisia (Mahjoub 2009, pp. 45-48) approaches this issue by correlating an index of migration intensity (calculated as the number of migrants per 1000 inhabitants between 1999 and 2004) and unemployment, labour participation rate (of women) and school enrolment rate (for the 6-14 age bracket). Whereas results of the correlation are not significant for the labour participation rate, the exercise shows a significant inverse correlation between migration rate and unemployment rate by governorates and a positive one between migration rates and school enrolment rates. It exceeds the brief of this Study and of the National Background Papers to undertake such kind of analysis for all countries and labour market variables; but such a region-level analysis of labour market and migration patterns, often requiring specific household surveys to be carried out, would be extremely interesting for this topic.

5.2 Does Migration Cause Brain Drain in AMCs?

Apart from the impact of financial flows generated by migration on the labour market and the direct effect on labour supply, the other major channel through which labour migration affects national labour markets is its impact on the availability of skills and qualifications in the workforce. Here the academic debate (to a large extent based on evidence from outside the region) is far from conclusive.

Literature on the brain drain is very rich and has also taken a twist in the last few years (see Beine, Docquier and Rapoport 2001; Beine, Docquier and Rapoport 2006, and Docquier and Rapoport. 2008). There is a strong empirical evidence that, in most of the developing world, it is the more skilled who have the highest propensity to emigrate (Docquier and Marfouk, 2006; Hanson 2008). Traditional literature on the so-called brain drain (Bhagwati and Hamada, 1974) emphasized the adverse static effects of migration upon the endowment of skilled labour, with an ensuing negative developmental impact. If there are positive spillovers (externalities) associated with human capital or if education is financed through taxation, the emigration of skilled labour can hinder economic development. Possible corrections include taxing the emigration of skilled labour or requiring receiving countries to admit more unskilled workers from the developing world (Pritchett, 2006).

25 For instance, De Haas (2007) shows how migrant sending areas in Morocco became destinations for many internal migrants from other villages or from poorer regions; he cites Berriane (1996) and El Meskine (1993), who observe that many construction and agricultural workers in the Rif area come from the Tafilalt and Draa valley in Southern Morocco.

But this traditional view of migration as a net loss of human capital and skills has recently been qualified by factoring in the positive incentives it creates for increasing education investment on the part of families in the countries of origin and accounting for the net increase of skills this investment brings about. In AMCs, given that returns on education are comparatively low in the region, migration, under the right circumstances, could offer a means of increasing those returns. Stark et al. (1997) argue that "higher prospective returns to skills in a foreign country impinge on skill acquisition decisions at home", and this positively influences the sending country as only a fraction of the would-be migrants who increased their private investments in education in response to the prospect to migrate succeed in turning that prospect into reality. In our region, this is most obvious in Lebanon, but also in other AMCs.

Still, some recent theoretical and empirical contributions have introduced relevant *caveats* against the endorsement of excessive optimism here. The expected income-schooling profile at destination, which drives the educational decision of would-be migrants, can be reduced by relevant distortion factors. Immigrants tend to be overqualified for the job positions they take (Mattoo et al., 2008), and are overrepresented in manual occupations. Mattoo et al. (2008) includes Egypt in their analysis of brain waste in the US labour market; they show that workers from the MENA region have a higher probability of obtaining a qualified job if they hold a professional degree; however the probability of obtaining a qualified job with a master degree is only 49 per cent for an Egyptian migrant, compared to 80 per cent for an Indian.

This notwithstanding, the static negative effect due to the drain of the "best and the brightest" is unlikely to be offset by a substantial positive dynamic contribution to human capital formation. Migration can also have a relevant influence on the endowment of specific kinds of labour, such as health-care workers or doctors and engineers. This is the most frequent concern regarding the possible adverse effects of migration upon countries of origin (an argument often mentioned for Tunisia and Morocco, for instance in the National Background Papers).

This need not represent an actual concern for the migrant-sending countries if the domestic economy is unable to productively employ skilled workers; then their migration would not represent a worrying brain drain, but it would rather be the consequence of a substantial mismatch between the higher education system and the domestic labour market. The migration of skilled workers would thus alleviate the pressure on the labour market rather than represent a hindering factor for economic development. Indeed, in many AMCs the existence of large stocks of unemployed, underemployed or (in the case of women) inactive graduates would warrant the argument that those countries do not lose part of their human capital through migration, but rather valorise it and prevent its deterioration.

Another important channel leading to loss of skilled workers or brain drain from developing countries is through student migration. Many foreign students carry on living in the country where they moved to acquire higher education, and although the education costs fall on their families and/or the hosting countries, the positive selection of these students entail a loss of human capital for the country of origin.

In the case of AMCs, empirical evidence points to the need for a differentiated country-by-country analysis: in fact, some countries seem to suffer one kind or another of brain drain (in terms even of shortage of qualified labour in certain sectors induced by migration), whereas others do not, or could even be experiencing a "brain gain" through the increased investment in education stimulated by the prospects of migration and the positive impact on skill availability among returning migrants. Wahba (2007) has demonstrated that migration ends up producing a certain degree of brain drain in Morocco, Tunisia and probably Lebanon, but not so in other countries of the region where there is a huge supply of skilled labour.

In percentage terms, Lebanon is the AMC where the loss of skilled workers is most evident: migrants constitute almost a third of Lebanon's labour force, half of them skilled professionals. Data from the 2001 USJ survey (the most recent available) shows that the emigration rate among the tertiary educated stands at 29.7% (based on data from OECD countries, the rate of migration for the high skilled stands at 38.6%, according to data of Docquier and Marfouk 2005 – see Table 5.2.1). Almost 22% of university graduates migrate each year, and 50% of current university students wish to leave.

However, the rates of migrant selectivity among AMCs are highest in Egypt and Jordan, where the share of graduate migrants exceeds 50% (but due to the large stock no brain drain seems to be underway). In any case the region has seen the migration of 9% of their university graduates on average, almost double as much as the 5% world average. In the case of Algeria, for instance, estimates range from between 9.4% and 18% of all national graduates, in Morocco between 17% and 19.5% and for Tunisia between 12.5% and 21.5%, a very high level. In Egypt, by contrast, it stands at fewer than 5% (World Bank 2009a, p. 96). Figures in Table 5.2.1 are roughly equivalent to the more recent data provided for North Africa and Near and Middle East Countries in Table 6.3.1.1, referred exclusively to migrant workers in the EU. In any case, the figures in Table 5.2.1 should be taken as a minimum estimation of graduate migration in AMCs, since they exclude migration to Gulf States.

Table 5.2.1. Rates of emigration and selection rates of migrants from AMCs, 1990-2000

	Rate of emigration (%) by skills				Selection rate (%) by skills			
	Low	**Medium**	**High**	**Total**	**Low**	**Medium**	**High**	**Total**
Algeria	4.6	2.1	9.4	**4.5**	76.7	9.2	14.1	**100.0**
Egypt	0.2	0.8	4.6	**0.9**	18.3	22.9	58.9	**100.0**
Jordan	1.0	2.4	7.2	**2.8**	16.4	28.0	55.6	**100.0**
Lebanon	9.4	11.1	38.6	**15.0**	30.4	25.1	44.5	**100.0**
Morocco	6.8	8.1	17.0	**7.6**	70.6	16.5	12.9	**100.0**
Palestine	1.0	2.5	7.2	**2.9**	15.8	29.1	55.0	**100.0**
Syria	0.9	2.3	6.1	**1.9**	31.0	24.7	44.3	**100.0**
Tunisia	5.1	3.8	12.5	**5.4**	73.0	12.1	14.9	**100.0**

Source: Docquier and Marfouk (2005). Based on OECD countries of destination statistics.

In any case, what is clear is that the loss caused by migration of qualified workers is not only a direct cost, i.e. the cost of losing the production of those workers in the best jobs available for them in the county (that cost tends to be zero when graduate unemployment is very high, as it is the case in AMCs). There is also the opportunity cost of losing the returns on the investment in education made in those qualified workers, often with a substantial investment of public resources (public expenditure on education averages more than 5% in AMCs, a very substantial part of it on university education).

To what extent this loss of human capital and public education investment is compensated through the increase in private educational investment induced by the prospects to migrate in AMCs is unclear. While there is limited direct evidence with respect to the impact of the prospect to migrate on human capital formation in AMCs, some indirect evidence can be gained by observing the pattern of migration by skill levels reflected in Table 5.2.1. The theoretical arguments outlined above reveal that a necessary condition for the occurrence of a beneficial brain drain is represented by an increase in the expected return to education once migration prospects open up, and this entails that better educated individuals have either a higher incentive to migrate because of the prevailing wage distribution at destination, or a better ability to do so, because of skill-selective immigration policies. Still, what we observe in Table 5.2.1 need not be driven by a higher incentive or better ability to migrate for better educated individuals, as the skill premium in wage distribution tends to fall with higher levels of income. The possibility that the emigration rates across educational groups reported in Table 5.2.1 are influenced by the adoption of skill-selective immigration policies seems unreliable as well, as migrants to OECD countries from the Maghreb countries – such as Morocco and Tunisia – tend to move to Europe, which has not so far performed well in attracting skilled migrants. Migration to Europe occurs mostly through family reunification provisions or through irregular routes, which do not induce a skill-selective pattern of migration. Clearly, this need not apply to the countries of the Mashreq – such as Egypt, Jordan and Lebanon – whose migrants tend to move predominantly towards the Gulf countries and the United States, as these countries are characterized by a higher wage dispersion across skill levels than most OECD member countries. Egyptian and Lebanese would-be migrants can be induced to invest more in higher education by the prospect to migrate, and also to adjust the profile of their education to better match with the labour demand in the countries of destination. Nassar (2005) observes that half of Egyptian temporary migrants reside in Saudi Arabia, while Libya, Jordan, Kuwait and Iraq host the rest of the temporary migrant population, which represents the largely prevailing pattern of Egyptian migration. Temporary migrants are, on average, better educated than those who remain in the home country, and since 1985 the composition of the migration flows has changed towards a larger share of scientists and technicians, who currently represent about 40% of the total.

As far as Jordan is concerned, Chatelard (2004) observes that there is still a large demand for high skilled workers in the Gulf, while adequate employment prospects at home are limited for young graduates, as De Bel-Air (2008) argues. This entails that we can safely assume that migration is a way to improve on these low expectations, and to drive up educational investments, which will otherwise be ill-grounded because of the domestic labour market conditions. A similar argument can also be advanced in the case of Lebanon: the number of young qualified individuals who wish to get a foreign job has increased, as – after the 2006 war with Israel – "insecurity pushes towards the brain drain" (Hourani and Sensening-Dabbous, 2007), and 35% of managerial positions in international enterprises located in the Gulf countries are taken up by Lebanese workers (Kasparian, 2008).26

These arguments suggest that the common pattern of emigration rates across educational groups that we observe for AMCs could be driven by different factors: while for Mashreq countries the higher emigration rate for higher educated individuals may suggest that the conditions for the occurrence of a beneficial brain drain are in place, this is not the case for the Maghreb countries, where the pattern observed in Table 5.2.1 is likely to be due to the correlation between education and income. Individuals with a better level of education self-select themselves into migration just because they are better able to afford migration costs, but this does not lead to any beneficial brain drain dynamics.

We should also observe that both World Bank (2008a) and World Bank (2009) argue that MENA countries should adopt policies aimed at reducing the mismatch between the qualifications offered by their educational system and those demanded by the destination countries. Such a policy prescription indirectly suggests that a *beneficial brain drain* is unlikely to occur at present, as it suggests that domestic human capital formation does not respond to the features of the labour markets at destination.

Does migration create relevant shortages of workers in some sectors in AMCs? World Bank (2008a) argues that migration does not create bottlenecks in the domestic market of Middle East and North African countries. However, National Background Papers on Tunisia, Morocco and Lebanon show evidence of migration of qualified workers with skills for which there is a shortage of supply in the national labour market: evidence is scarce and scattered, but this seems to be the case in Tunisia and Morocco for engineers, computing specialists, managers and doctors[27], and to a lesser extent in Lebanon for nurses, medical technicians, agro-food specialists, translators, and semi-skilled

26 A different argument applies to Syrian migrants: the majority of temporary migrants to the Gulf are young professionals

(health professionals, engineers, and other qualified workers) who plan to stay at least five years abroad because this is the time they need to be able to be entitled not to serve in the military, in exchange for a monetary payment out of the savings they accumulated abroad (Kawakibi 2008b).

27 For the specific case of physicians, see evidece in the literature in the Thematic Background Paper Marchetta (2009 pp. 19-20).

construction workers. This could have a negative impact on the prospects for the expansion of high added-value sectors incorporating new information and communication technologies for managing production systems. This could, in fact, give rise to a vicious circle: qualified workers migrate because of a lack of chances in the local labour market, and their migration becomes a serious obstacle to the emergence of high added-value, high productivity sectors, thus preventing the demand for skilled migration to develop (see Section 2.4 on graduate unemployment).

In Jordan, Egypt, Syria and Algeria, in contrast, there is no evidence for a real brain drain. In Egypt, the evidence suggests that a substantial proportion of Egyptian emigrants to OECD countries are highly educated, with around 59% of total emigrants from Egypt in 2000 being so classed. Overall, migrants, both returnees and current, tend to be more educated than non-migrants (Wahba 2007). But the stock is so large that the emigration rate among the highly educated is quite low at only 4.6%; this suggests that Egypt is not experiencing a brain drain problem. From another perspective, given the educational mix of the migrants, there have not been apparent bottlenecks in the Egyptian labour market that persisted. The emigration of skilled workers did not have negative impact on the labour market since they were either unemployed or worked in the public sector where wages are not flexible and as such emigration does not affect wages, but might have reduced the public sector wage bill. Of course, although Egypt is not losing an important proportion of its educated workers and thereby is not facing a brain drain, Egypt continues to lose human capital which it has invested in and educated, since education is free in Egypt. This may still be an issue of concern. However, this cost may be outweighed by the potential gains from remittances and the reduction in pressure on the labour market given the high unemployment rate in Egypt among the educated.

In Jordan, despite the high outflow of skilled workers, there remains a significant number of skilled unemployed workers available who hold qualifications relevant to the needs of the labour market. Although many employers perceive a lack of skills in the Jordanian labour force, the educational profile of the unemployed shows that the problem is often not a lack of relevant qualifications, but a lack of appropriate skills among those holding such qualifications. By combining the data from DIOC and the US Census Bureau, an estimate of 12,600 Jordanian migrants[28] employed in skilled occupations in OECD countries can be calculated.[29] This is an extremely small figure compared to the 225,000 Jordanians employed in skilled occupations in Jordan[30] and thus it can be assumed that migration to OECD countries is not leading to a brain drain, especially taking into consideration the 40,000 unemployed Jordanians with university degrees in Jordan itself.

5.3 Remittances and the Prospects to Migrate

Remittances can stimulate productive investments (Orozco, 2000; Woodruff and Zenteno, 2007), ease the provision of credit and the development of financial and equity markets (Giuliano and Ruiz-Arranz, 2009; Billmeier and Massa, 2009), although these positive developmental contributions are not independent of the economic and institutional frameworks of recipient countries. Giuliano and Ruiz-Arranz (2009) use data from approximately one hundred developing countries over the period 1975-2002 and they show that remittances provide an alternative way to finance investment in countries with poor financial systems. Remittances can help to overcome liquidity constraints in countries where credit markets are inefficient or non-existent. Aggarwal et al. (2006) use a sample of 99 countries and they argue that remittances promote stock-market development, and Gupta et al. (2007) reach the same

28 For all countries excluding the US, this refers to Jordan-born migrants falling under the ISCO classifications 'Professionals' or 'Legislators, senior officials and managers'. For the US, this refers to Jordan-born migrants falling under the classification 'Management, professional and related occupations'.

29 Excluding Germany, for which the relevant data is not available.

30 DoS (2007) Employment Survey 2006 Annual Report.

conclusion for Sub-Saharan Africa. Needless to say, these effects can give rise to a significant indirect impact on the labour market through the ensuing job-creation effect.

Macroeconomic impact aside, remittances are often thought to influence the labour market by affecting the behaviour of potential workers. Remittances can exert an influence on recipients' behaviour on the labour market through two main channels, namely the income effect that modifies the willingness to work in exchange for a wage, be it through higher reservations wages (thus increasing unemployment) or through a reduction in labour participation rates, or through the impact on the demand for labour in family-run activities which is determined by the use of remittances to finance small-scale productive investments.

The issue of remittance use by migrants has attracted the greatest interest and debate. Some argue that remittances are used primarily for the purchase of land and housing and general household consumption, rather than "productive investment" and conclude that remittances thus do little to stimulate development in the home country. Others believe that migrants do save and invest, that expenditure on land and housing are rational under prevailing conditions (they frequently offer better rates of return or are a better store of value than other available investments) and that expenditure on housing and consumption have positive multiplier effects on the whole economy. The stimulus that migration – via remittances – brings to private demand produces substantial effects on the labour market only inasmuch it is directed towards domestically produced goods and services. Regrettably, as Gallina (2006) observes, there is limited information on the pattern of remittance uses in AMC countries. Some information – albeit coming from a survey with a very limited coverage- are provided by EIB (2006), which analyzed the distribution of remittances across alternative budget items in all AMCs but Palestine. Table 5.3.1 reports the main findings from this survey, which evidences that everyday expenses absorb most of the income arising from remittances, while limited resources are devoted to investments. Schramm (2006b) provides evidence – for Tunisia, Morocco and Egypt – that suggests that basic consumption needs (food, heat and clothing) absorb most of the income from remittances.

Table 5.3.1 Use of remittances in AMCs (% of total remittances)

	Daily expenses	Payment of school fees	Building a house	Setting up a company	Investments	Other	Number of interviewees
Algeria	45	13	23	3	5	11	64
Egypt	43	12	18	-	15	12	31
Jordan	74	16	4	-	6	-	40
Lebanon	56	24	5	5	5	5	41
Morocco	46	31	16	-	5	2	40
Tunisia	-	23	34	2	16	25	40
Syria	61	11	8	-	-	20	49

Source: EIB (2006)

But remittances and the prospect to migrate can also influence the supply side of the labour market through a variety of channels. The prospect for migration can have an impact on the participation rate and on the reservation wages of domestic workers (Fan and Stark, 2007). This argument entails that the relationship between unemployment and migration runs in both directions: on the one hand, a high level of unemployment represents a powerful push factor for migration, while, on the other, the prospect to migrate can exert an upward pressure on the unemployment level itself. In AMCs, this effect is perhaps most evident in Lebanon, mostly linked to high private educational investments and a high cost of living (see National Background Paper, Chaaban 2009), which discourages Lebanese workers from engaging in low-skilled jobs.

As far as the supply of labour is concerned, remittances can reduce the work effort of the members of recipients households due to the positive income effect they bring about (see the recent empirical contribution, related to Mexico, by Cox Edwards and Rodríguez-Oreggia 2009). Remittances also loosen the liquidity constraints that can hinder investments in education (Cox-Edwards and Ureta, 2003; Rapoport and Docquier, 2006) as young members of recipient households have a higher probability of migrating than the rest of the population (Van Dalen et al., 2005). Thus, whether the positive income effects determined by the receipt of migrant remittances feeds into higher investment in education depends on whether the prospect to migrate improves or worsens the incentives to make such an investment. If the former is the case, then remittances can delay the entrance of young cohorts to the domestic labour market, as they raise the enrolment rates in higher-education institutions. In the medium run, this would improve the skill-composition of the labour force. If, on the other hand, the prospect to migrate reduces the incentives to invest in education, remittances could be used to finance the migration cost for an additional household member. Observe that in both cases remittances reduce – in the short run – the size of the younger cohorts which enter the labour market, either through a higher retention rate in the educational system, or through increased migration. Remittances can also produce a detrimental impact on human capital formation, if they open up opportunities to undertake productive investments in family-run activities, which represents the use of remittances which is supposed to be the use which delivers the greatest developmental contribution for the recipient countries (see Taylor, 1999 for a critique of this position). For evidence for selected Middle Eastern countries, see Bouhga-Hagbe (2006). Although the educational systems in most AMCs impose limited direct costs upon the students and their families (Vossensteyn 2004), indirect costs can be substantial, and the positive income effect due to remittances can improve households' ability to afford them, thus raising the educational achievement of young members in recipient households. Table 5.2.1 shows that – as far as the Maghreb countries are concerned – the vast majority of current migrants have low levels of education, so remittances can give an opportunity to break this poverty trap, raising the level of education of young family members over and above the one of the migrants. Indeed, Table 5.3.1 above reveals that school fees represent the second or third most relevant use of remittances in recipient households in all the seven AMCs surveyed by EIB (2006). There are a number of studies – such as Berriane (1996), Bencherifa (1996) and de Haas (2003), quoted in de Haas (2007) – which argue that remittances to Morocco contribute to an increase in expenditures in education which benefits young pupils of both sexes.

As far as the impact of remittances on the labour participation rate of women is concerned, a recent book by Ennaji and Sadiqi (2008) analyzes the impact of the – predominantly male – migration from Morocco on the women left behind, and it finds that they tend to assume roles in the production activities that were formerly covered by the male migrants so their participation rate increases instead of decreasing. Nevertheless, Ennaji and Sadiqi (2008) argue that "most migrant husbands would refuse to allow their wives to work outside the home because this work jeopardizes their social role and the image as household bread-winners". They also provide evidence that migration is associated with a relevant change of family structures, as 26.2% of the sampled women went back to live with their parents, who can help them in taking care of the children. This is so because AMCs are often characterized by "weak transportation and child care infrastructure [that] discourage women from going out to work, as does the lack of social support for children or the aged, the burden of whose care falls on women" (UNDP 2006), and the women left behind do not seek employment because of "their inability to combine their work outside with duties as mothers and housewives". Such a change in family structure is clearly connected with the need for greater female engagement in the labour market, and it suggests that migration *per se* can increase female participation rates on the labour market. Nevertheless, such an effect need not materialise: even in Palestine, when the husband migrates, women tend to live with their husbands' families, but this does not consolidate an active role in the labour market (Hilal 2007). Thus, it is important to stress that increased female participation can be expected to be mostly confined to self-employment activities – such as family-run agriculture or retail trade – rather than to wage employment, given the persistent and high levels of male unemployment even in migrant-sending areas. Thus, the argument provided by Hijab (1988), who observed that the women left behind increased their participation in the labour market in Egypt because there was a need at the country level to mobilize women to replace migrant men, seems hard to defend and generalize.

It is also interesting that the eventual job-creation effects determined by migrant remittances can be unevenly distributed across genders; Vargas-Lundius (2004) argues that the receipt of remittances in the origin communities stimulates the creation of jobs where men represent a disproportionate share of the workers – for example, in the construction sector –, so that remittances could reinforce existing gender inequalities in labour market outcomes such as wages and unemployment rates.

Finally, remittances do certainly contribute to boost informal employment. In their study of determinants of remittances of migrants coming from Mediterranean countries established in France, Mouhoud, Oudinet and Unan (2008) stress that the bulk of remittances from Mediterranean migrants are not sent through the formal financial circuits, and are hence difficult to check. The same is true of Egypt: recent figures for 2006 still suggest that Hewala (32%) and friends/relatives (31%) are the two most popular ways for migrants to send remittances to Egypt, with almost two thirds of households receiving remittances by these methods. Only 22% of current migrants send their transfers through the banking system (Wahba 2007). These unregistered remittances could be feeding the informal economy, in particular in the construction sector, which absorb a high proportion of those flows (see Collyer 2004 and Section 5.4).

Turning to direct evidence from the region, several AMCs are high in the world ranking in terms of remittances to GDP ratio, with Lebanon (22.8% of GDP) and Jordan (20.3%) in the Top 10 receiving countries in 2006 (see Table 5.3.2). In absolute terms, Egypt, Morocco and Lebanon are amongst the 20 top remittance recipient countries in the world, and AMCs are the group of countries in the world with the highest *per capita* remittances level. However, once again data on remittances is shaky, with estimates for remittances to the region showing a high dispersion. What, at any rate, is clear is that, in the AMCs, remittances are a much more important financial flow than foreign direct investments (in Lebanon, for instance, $5.2 billion vs. $2.6 billion in 2006).

Table 5.3.2 Remittances in Arab Mediterranean Countries

	Flow of remittances received (2007, billion US$)	Remittances % of GDP (2006)
Morocco	5.7	9,5%
Algeria	2.9	2.2%
Tunisia	1.7	5%
Egypt	5.9	5%
Palestine	0.6	14.7%
Jordan	2.9	20.3%
Lebanon	5.5	22.8%
Syria	0.8	2.3%

Source: Migration and Remittances Factbook 2008, World Bank.

However, it has to be noted that these are official remittances, i.e. transmitted officially and hence certainly underestimates. More recent figures by the Central Bank of Egypt, for instance, show record high remittances amounting to $8.5 billion in 2008 (44% more than the official figures). Lebanon, Algeria and Tunisia also experienced record levels of remittances in 2008 (see Fargues 2009, p. 34). In other cases, like Jordan, national official figures are below the World Bank figures (the Central Bank of Jordan, in its *Monthly Statistical Bulletin,* estimates remittances at 16% of GDP).

To date, no economic study has been undertaken to gauge the relevance of either of these two channels specifically in AMCs, as the endogeneity of remittances with respect to labour market conditions in the migrant-sending areas prevent us drawing any definitive conclusion on the causal relationship between remittances and prevailing wages and unemployment levels.

In any case, an important issue related to the impact of remittances on the labour market is who receives the remittances and the impact of these financial windfalls on labour market behaviour. In the case of Egypt, in 2006, almost 65% of overseas remittances were sent by spouses and a quarter by off-spring. Also, 60% of households receiving remittances had female heads. Households receiving remittances were more likely to be rural (almost 69%). Heads of households receiving remittances were less likely to be waged workers and more likely to be out of the labour force. This may reflect the fact that a large proportion of receiving heads were females (Wahba 2007).

Palestinians "Circular Migration" to Israel:
A Test Case for the Impact of Remittances on the Economy

A very special and unique case, but at the same time a very interesting case-study of circular (daily) migration and for the impact of migration on labour markets in countries of origin, is the case of Palestinian workers in Israel between the late 1970s and the late 1990s. Until the outbreak of the second *intifada* in year 2000, the main source of employment for the Palestinian labour force was the Israeli labour market, where they engaged in daily commuting to and from Israel to work mainly in the construction and agriculture sectors and where they could typically earn an average of 26€ a day, for 14€ a day in the local Palestinian labour market. In 1999, the number of Palestinian workers in Israel reached 114.000, more than 20% of the labour force (150.000 according to other sources), and remittances received by Palestine amounted to close to 1bn US$ a year.

In 2000, an important proportion of those workers lost their jobs and their ability to move freely and to continue enjoying legal work in Israel and so the rights of compensation and other allowances. This gave rise to i) more 'irregular' employment in Israel where workers had no special Israeli permits for work, although this phenomenon has too started to decline since Israel started building the Expansion and Annexation Wall, ii) a steep increase in unemployment in the Palestinian Territories (in particular in the Gaza Strip, where the ban to cross to Israel to work has been total), iii) an increase in poverty rate and a collapse of demand in the Palestinian Territories, with an indirect effect on production and economic activity, iv) an extension of the informal economy, including of women, to make up for this loss of employment and income, v) an increase in public sector employment, particularly in the Gaza Strip, vi) an increase in the engagement of women in economic activities, often in the informal sector.

By 2008, the number of Palestinians working in Israel has been reduced to 74.000, 30.000 of them from Jerusalem (who are subject to less strict regulations than PT Palestinians allowing them to work and move freely in Israel). Remittances have stabilized at around 600 million US$ a year, a 30% decrease in relation to the peak year of 1999.

The estimated losses of Palestinian labour due to the closure of the Israeli labour market during the first 27 months of the second intifada was 1.3 billion US$, in addition to 28 billion US$ of work compensation for Palestinian workers in Israel. The latter figure represented more than 50% of Palestinian GDP before the outbreak of the intifada (PCBS, 2005. Palestinian Labour Force in Israel and Settlements (1995-2003). Ramallah-Palestine).

National Background Paper on Palestine
Mustapha Khawaja and Mohammad Omari (2009)

However, high level of remittances as a factor in explaining the low labour participation rates of women in AMCs is far from proven. Female labour participation rates are lower throughout AMCs, regardless of the level of remittances these countries receive, and they are much lower in AMCs than in other developing countries with similar levels of remittances. So this points rather to cultural factors as the key to low female participation. Jordan supports this point. Most economically-active women in Jordan come from mid-to-high socio-economic backgrounds and have high educational attainment. It is among less educated women from poorer socio-economic backgrounds that economic activity rates are extremely low. Importantly, remittances in Jordan accrue mostly to prosperous households with high educational attainment (World Bank 2007). This suggests that remittances are not a major factor in decreasing Jordanian women's labour market participation.

Average wages do not seem to be affected by remittances either; they seem to be determined by the legal minimum wage on one side of the spectrum (with informal sector wages under the minimum wage) and by public sector wages on the other (see Section 2.3). The high prevalence of unemployment and the spread of the informal economy have delinked wage levels from the level of migration or the transfers of remittances: adjustments in the labour markets are made through the rate of unemployment rather than wages.

In contrast, there seems to be an evident impact of either remittances (actual household income) or the prospect to migrate (expected or potential personal income) on reservation wages of certain categories of workers. This is most visible for graduates in Lebanon, but to a lesser extent in Jordan, in Morocco and possibly in Egypt too. This might contribute to the high level of graduate unemployment in the region.

An interesting approach in order to better understand the relationship between remittances and labour market performance would be to bring the analysis to the sub-regional level, but this is well beyond the scope of this Study.

5.4 Impact on Informal Employment

Whether migration has any impact on the informal economy is difficult to measure. In the 1970s and 1980s, the maintenance in most AMCs of multiple exchange rates and restrictions on business access to hard currency encouraged the illegal entrance of remittances at the black market rate, where migrant workers could obtain a substantial gain for their foreign currency over the official rate of exchange on the open market. However, by the late 1980s, exchange rate reforms corrected this misalignment and brought remittances in through official channels. Those notwithstanding, all surveys indicate that the transmission of remittances through personal or unregistered channels is still very important.

In any case, it is obvious that the difficulties in controlling the flows of remittances and the private (often household) nature of these sums tend to facilitate their dissemination into the informal sector of the economy, feeding informal employment and the informal economy at large. Another aspect to be considered (and one that is very evident in Morocco, for instance), is the feeding of parallel economic circuits through the physical imports of consumption and equipment goods or the transfers in kinds made by the migrants themselves. But the quantification of this effect would require surveys on the ground, and so far no survey of this kind has been carried out in AMCs.

5.5 Impact of Return Migration

Much attention is being paid in the last few years to return migration. It is depicted as one of the main channels through which migration can benefit countries of origin. Indeed, the impact of return migration on development has been extensively researched in terms of financial, human and social capital resources. In contrast, its effects on national labour markets have received less attention, in particular as far as the profile of returning migrants is concerned.

Migrants can acquire higher education or relevant on-the-job experiences when abroad and then employ these fruitfully upon return. The influence on the supply side of the labour market is direct if returnees complete their migration experience while they are still within their working life. The positive impact of return migrants on the labour market is difficult to measure, and it will depend on a series of conditions. One of them is that the return be voluntary and not forced, imposed by political or economic circumstances that might lead to a collective return of national workers. Forced return of migrants (such as happened after the first Gulf War in 1991 with migrants in the Gulf countries returning to Egypt, Jordan or Tunisia or as might be beginning to happen now as a consequence of the global economic crisis) have a much less positive impact on labour markets in countries of origin, as any positive effect of this *reverse brain drain* is often offset by the increase of labour market pressures induced by their return.

For the Maghreb countries, the project on *Return Migration to the Maghreb*, MIREM[31], showed that almost two thirds of the surveyed return migrants went back to the Maghreb before the age of 50, and 43.2% of them before the age of 40, so with the prospect to spend a sizeable portion of their working age life back in the countries of origin. Similarly, the data from the two waves of the Egyptian Labour Force Survey conducted in 1998 and 2006 suggest that even for Egypt a sizeable share of the returnees went back home well before retirement age.[32] This suggests a possibly significant positive impact on AMC labour markets.

In Egypt, were the phenomenon of return migration is far more widespread and hence more studied than among other AMCs, according to the ELMPS 2006 around 2.5% of the working age population in 2006 have worked overseas previously, i.e. are overseas returnees. Moreover, 7.1% of households have a return overseas migrant. This has to do with both the tradition of temporary migration to the Gulf countries and the possibility of public sector employees taking a two-year leave of absence to work abroad (see box in Section 4.2 on this scheme). The latter has led to an extraordinary configuration: the share of returnees (36%) working in the government sector is higher than among non-migrants (26%). The positive impact of migration in the labour market is reflected in this case by the fact that only 40% of returnees under this scheme resume their job in the public sector. Wahba (2007) compares returnees to non-migrants in the labour market in 2006 and finds that returnees seem on average to be more skilled than non-migrants. Examining the educational levels of current, return and non-migrants in 2006 based on the 2006 ELMPS suggests that return migrants are more educated than non-migrants. However, return migrants are on average only slightly more educated than current migrants: almost 25% of returnees hold a university degree compared to 23% among current migrants.

The hypothesis that return migration increases the probability of entrepreneurial activity has been recently tested for some countries, comparing returnees with stayers. Kilic et al. (2007) find that returnees to Albania are, *ceteris paribus*, more likely to become entrepreneurs than stayers. Wahba and Zenou (2008) conversely find that Egyptian returnees have a lower propensity to set up an entrepreneurial activity, notwithstanding the experiences and the savings they have accumulated abroad – migration also produces a loss of social capital, a key factor in establishing an enterprise which operates in an informal setting. However, data from the Egypt Labour Market Panel Survey 2006 reveal that a significantly larger share of returnees was engaged in an entrepreneurial activity, and – more interestingly – that the survival rate of SMEs run by return migrants between 1998 and 2006 exceeded, by 14 percentage points, the corresponding figure for stayers. McCormick and Wahba (2001) found that one of the most important aspects of international migration has been its impact on occupational choice upon return and its tendency to increase the share of employers and entrepreneurship in Egypt. They provide evidence that the duration of the migration experience and foreign savings increase the probability of becoming an entrepreneur upon return to Egypt: temporary migration, through savings, provides access to credit which enable returnees to become self-employed and so entrepreneurs.

Another aspect of return/temporary migration is their overseas work experience and the extent to which it impacts on human capital by affecting wages of migrants upon return to the home country. Wahba (2007b) finds strong evidence that overseas employment and temporary migration result in a wage premium upon return to Egypt. On average, return migrants earn around 38% more than non-migrants in Egypt. The findings show that highly-educated (university graduate) returnees earn on average 19% more than non-migrants. Indeed, the wage premium is even higher for the uneducated returnees who earn on average 43% more than non-migrants. This evidence highlights the importance of temporary migration on human capital in Egypt.

In any case, the evidence available, also from AMCs, definitely confirms the hypothesis of the positive effects of return migration. However, one should not forget that, with the possible exception

31 Robert Schuman Centre for Advanced Studies.

32 In 2006, 70 per cent of Egyptians return migrants were less than 50 years old (ELMPS, 2006).

of Egypt, so far the magnitude of return migration in all other AMCs is marginal both relative to the size of the workforce and to the size of migration flows in general. On the other hand, the invaluable positive effects return migration has on labour markets in countries of origin and more generally in their economic activity and even business climate, explains this interest and advocates for schemes to stimulate the return of migrants. In any case, a fundamental question is that of how to reach out to the members of the diaspora and encourage them to return on a permanent or temporary basis, to transmit their skills.

An interesting lesson, in this respect, is what happened in the Maghreb countries in the 1970s and 1980s. The number of migrant returnees to Maghreb countries fell between 1970 and 1974, as France, main destination of Maghreb migrant workers at the time, prepared and then applied measures limiting immigration. These measures produced exactly the contrary of the intended effect: they reduced returns and contributed to stabilize immigrants in France. Through family reunification, they ended up causing an increase in the number of immigrants instead of a reduction. Return migration from Europe to Maghreb countries has been very weak ever since.

6. EU Migration Policies and Arab Mediterranean Countries[33]

Labour market considerations have only recently been integrated as one of the main determinants of EU migration policies, and the consideration of the impact of those policies on labour markets and development prospects of countries of origin of migrants is even more recent. The "Global Approach to Migration", promoted by the European Union since 2005[34], could provide a solution to ensure not only that migration is a positive sum game, but also that all actors in the migration process benefit: the non-migrants in the origin and host countries as well as the migrants themselves. Indeed, the December 2006 European Council stressed the need to give "consideration to how legal migration opportunities can be incorporated into the Union's external policies in order to develop a balanced partnership with third countries adapted to specific EU Member States' labour market needs", and to explore "ways and means to facilitate circular and temporary migration".

These preliminary statements notwithstanding, it is important to get to grips with how current political, institutional and legal elements in the Euro-Arab Mediterranean context could converge so as to define the premises and applicability of the Global Approach paradigm in the region. Indeed, the current economic crisis makes the concrete implementation of the Global Approach to Migration more difficult, but at the same time more necessary than before.

As a starting point, it is worth noting that mobility trends induced by legislation, which tend to constrain the migrant's natural propensity to circulate freely, have to be revised in the light of the new set of incentives they bring about. Hence, an assumption that has to be tested is whether promoting temporary migration, as the EU pretends to do, could mitigate spontaneous irregular migration, reduce brain drain and contribute to eliminating the *rentier* economy effect. Furthermore, more efforts should be invested in assessing whether and how international cooperation – in this case, EU relations with the AMCs in the framework of the

33 This Chapter is based to a large extent on the Thematic Background Paper on EU Migration Policy Towards Arab Mediterranean Countries and its Impact on Their Labour Markets (Venturini, Fakhoury and Jouant 2009).

34 On the necessity of developing a real "Global Approach to Migration", see the European Council Conclusions of December 2005 and the appendix " Global approach to migration and Priority Actions focusing on Africa and the Mediterranean", http://register.consilium.eu.int/pdf/en/05/st15/st15744.en05.pdf. For a more developed approach see Presidency Conclusions of the Brussels European Council (14/15 December 2006) "A Comprehensive European Migration Policy", and the Commission Communication "The Global Approach to Migration One Year On: Towards a Comprehensive European Migration Policy" COM (2006)735.

Euro-Mediterranean Partnership and the European Neighbourhood Policy – might foster a more positive climate for such a change.

6.1 The Emergence of an EU Migration Policy and the Consideration of Labour Needs

Some of the factors that have motivated EU member states to coordinate in the field of migration policy are related to:

i) the increase in challenges posed by mounting migration pressures,[35]

ii) labour market demands,

iii) the necessity of cooperation in the wake of increasing EU integration and enlargement drives, in particular the free circulation of persons within the EU implemented through the Schengen Agreement which came into force in 1995 in the wake of the Single European Act establishing the Single Market.

The Thematic Background Paper (Venturini, Fakhoury and Jouant 2009, Sections 1.1 and 1.2) provides an overview of the emergence of an EU migration policy.

A turning point linking the development of the EU's migration policy and labour market considerations was the Lisbon Strategy adopted in 2000. Since this date, more and more attention has been given to relating integration policies to employment and labour, examining immigration in the context of demographic ageing and skill shortages, and devising policies that take into consideration legal migration channels to respond to labour needs. Indeed, the Lisbon Strategy was a stepping stone in the process leading to the European Employment Strategy.[36] It became evident that to maximize labour supply and reach these ambitious employment rate targets, it should take into consideration the labour and economic features of immigration, and that these features should be integrated in a strategy that could encourage skill development and mobility. In its 2000 Communication on a *Community Immigration Policy*, the European Commission already underlined in that more attention should be given to the potential contributions of third-country nationals in the EU labour market and that "channels for legal immigration to the Union should now be made available for labour migrants."[37]

Another milestone in the making of an EU-wide migration policy was the Seville European Council of 2002, which focused on fighting irregular migration and stressed readmission, hence emphasising Member States' preoccupations with migration governance and security issues rather than with economic immigration. The Conclusions of the Council aimed specifically at incorporating third countries as EU partners in migration management. Thus, the conclusions urged that EU cooperation with third countries include a clause entailing joint migration management, and readmission in the case of irregular migration.

35 Notably the increase in irregular migration, the need to manage migration flows and mobility as well as the free flow of workers within the EU, human trafficking, and the socio-economic costs of asylum.

36 The Luxembourg European Council in November 1997 launched the European Employment Strategy (EES), also known as 'the Luxembourg process' whose aim is to reform the EU economic agenda and meet challenges posed by the EU labour market's needs and demands. The objectives fixed by this strategy revolve around full employment, quality of work and productivity.

37 Communication from the Commission to the Council and the European Parliament on a Community Immigration Policy, Brussels 22.11.200, COM (2000) 757 final, p. 3, available from http://www.statewatch.org/docbin/com/30.00757.pdf.

While progress was made on the integration of third-country migrants working within the EU, a structured labour-migration strategy targeting legal economic immigration and first entry of third-country migrants for employment activities lagged behind. Therefore, a more concrete approach on how first-entry could benefit EU economic competitiveness remained underdeveloped. This was particularly evident in the following illustrative cases. In July 2001, the Commission presented a proposal drafting conditions and rules of admission targeting entry and residence of migrants for the purpose of paid employment and self-employment activities.[38] As there was no consensus on this issue, the Commission had to withdraw this proposal in 2006. The difficulty of adopting common legal positions with regard to labour migration among Member States was highlighted once again in regard to the Hague Programme (Carrera 2007, p. 4). Indeed, the European Council made clear here that labour immigration was a national competence and that adopting common legal positions with regard to labour migrants was still far-fetched. Again, in 2007 the Commission proposed the adoption of common sanctions for employers recruiting third-country nationals without employment permission. However, this proposal has faced strident opposition and has not been adopted as yet. [39]

In sum, the European Commission's emphasis on developing a common labour migration framework has been at odds with the desire of EU Member States to retain their prerogatives in this sphere and to resist a community policy which would circumscribe or curb national decision-making. These inherent tensions at the EU level not only hindered the elaboration of a common EU labour strategy, but have indirectly got in the way of identifying and responding to labour-market needs in the Euro-Mediterranean region.

6.2 The *Global Approach to Migration* and Economic Immigration since 2005: an Integrative or Partial Process?

Since 2005, the interconnectedness between establishing and regulating legal migration channels, a more holistic approach to migration, and a more coherent EU labour strategy with regard to economic immigration has been stressed.

On the one hand, more attention is paid to the need to regulate migration flows in order to fight irregular migration and address challenges linked to demographic gaps in Europe and their repercussions on labour markets. For instance, in December 2005, the Commission issued a *Policy Plan on Legal Migration* which further set out the roadmap that the EU would embark on in order to concretise the Hague Programme.[40] This policy plan explicitly addresses policy features and legislative measures related to economic migrants such as the conditions of entry and residence of economic migrants. More specifically, it puts forward five legislative proposals on economic immigration to be adopted in the period 2007-2009 and divides economic migrants into four categories: highly qualified workers, seasonal

38 European Commission, "Proposal for a Council Directive on the conditions of entry and residence for the purpose of paid employment and self-employment activities", COM (2001) 0386 final, Brussels,
http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2001:0386:FIN:EN:PDF.

39 "Proposal for a Directive of the European Parliament and of the Council providing for sanctions against employers of illegally staying third-country nationals " COM (2007) 249 final, Brussels,

http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52007PC0249:EN:NOT.

40 Communication from the Commission – Policy Plan on Legal Migration SEC(2005)1680,

http://eur-lex.europa.eu/LexUriServ/site/en/com/2005/com2005_0669en01.pdf.

workers, remunerated trainees and intra-corporate transferees. It also encourages circular migration as a strategy that responds to "labour needs in Member States while contributing, through eventual return, to the development of countries of origin and offering skills and other gains to participating migrants."

On the other hand, there is increasingly a sense that a common EU migration policy needs to encompass the needs of countries of origin and resort to new cooperative mechanisms which are founded more on a global than on a unilateral EU approach. This is why the Global Approach to Migration adopted in December 2005 highlights the need for a multilateral path as migration patterns have defied geographical and narrow institutional arrangements. The document draws attention to "how best to share information on legal migration and labour-market opportunities".[41]

However, upon analyzing the 2005 Global Approach to migration and how it has been implemented so far (see Section 6.3 below on the Blue Card, for instance), one is first inclined to inquire whether the Global Approach to Migration only partially addresses economic migrants' profile and flows, and whether it really aims at laying the foundations for a holistic approach responding to all migration imperatives and realities in the Euro-Arab Mediterranean area.

In a wider perspective, whilst studying the evolution of the EU common labour and migration strategy that culminated in the Global Approach to Migration, it must also be asked to what extent the origin countries' needs have been effectively taken into consideration in drafting the major milestones of EU migration policy. In fact, though promising, the Global Approach is not presently endowed with sufficient components to remedy both policy gaps in the origin countries and *the root causes* of migration. It is important to recall here that the European Council, in its conclusions regarding a comprehensive European Migration Policy in 2006, underscored the fact that "the migration and development agenda will be intensified by increasing coherence between the Union's various policies, including their financial instruments, with a view to addressing the root causes of migration." [42]

However, it is to be acknowledged that so far no transversal approach providing the missing link between the EU and origin countries' labour needs and demands and taking into account the root causes of migration against the backdrop of EU-Arab Mediterranean countries economic cooperation has been sufficiently developed. In the near future, more serious reflection should be given to asking how the Global Approach might not only mirror EU labour and migration needs, but also those of the origin countries and – on a deeper level – the root causes of migration at both ends. Moreover, consultative processes in the EU-Arab Mediterranean area should identify how the Global Approach could be equipped with more powerful and specific instruments capable of respecting this double dynamic:

1) Address all economic emigrants.
2) Devise a transversal problem-solving track which not only reflects a demand-driven approach to migration based on EU labour needs, but that is also based on the acknowledgement that a holistic approach to migration should integrate the needs and priorities of origin countries.

41 See "Global approach to migration: Priority actions focusing on Africa and the Mediterranean",

http://register.consilium.eu.int/pdf/en/05/st15/st15744.en05.pdf.

42 See footnote 34.

These reservations notwithstanding, it is important to draw attention to the promising potential of the Global Approach to Migration and to underscore the fact that since the re-launching of the Lisbon Strategy in 2005 (though what has come to be named the Stockholm Process), major emphasis has been laid on revisiting the link between the management of legal migration channels, economic immigration and development. Thus, the Employment Guidelines (2005-2008) adopted by the EU Council in the summer of 2005 accentuated the need to stimulate growth and employment as well as to reduce employment discrepancies for EU citizens as well as for third-country nationals. The Guidelines also specifically addressed labour migration governance as a key element in filling in gaps lurking beneath labour-market needs in the EU. As mentioned, in December 2006, the Brussels European Council further underlined the necessity of developing legal migration policies that line up with national priorities and that tackle future labour and development needs.

Whilst recognising that migration has become an established fact, more recent EC communications lay further emphasis on the link between migration management and labour migration orientations, in the context of a long-term and more global approach. As migration has become one of the key issues determining the EU agenda and EU labour market needs, the understanding of the need for further convergence between EU member states and third countries in legal and labour migration developments is gaining momentum. Thus, in the 2007 Commission's Communication *on the European Interest: Succeeding in the Age of Globalization*, the following is stressed:[43]

> In a Europe with no internal borders, the changing demands of an ageing society and a labour market in constant evolution have challenged established assumptions about migration from outside the EU. A new global approach is needed so that migration strikes the right balance between the risk of labour market shortages, economic impacts, negative social consequences, integration policies and external policy objectives.

The 2008 Communication on *A Common Immigration Policy for Europe: Principles, Actions and Tools* focuses on ten principles grouped under three main benchmarks: prosperity, solidarity and security. The principles stress the importance of strengthening the relation between legal immigration and socio-economic development in the EU, emphasizing solidarity among the member states and devising partnerships with the countries of origin and transit, and lastly, ensuring that rules governing legal immigration are met and that illegal immigration is efficiently curbed. The Communication specifically targets immigration in relation to "future labour and skill shortages" with a view to increasing "the EU's growth potential and prosperity".[44] It furthermore addresses the link between "the employment and social impact of migration of third-country nationals" in the framework of a common immigration policy, and stresses that "economic immigration in the EU will need to be assessed" by taking into consideration "the match between skills of the immigrants and national labour market needs". Also, the importance of creating legal migration and integration channels for permanent and temporary migrants and of matching skills with labour market needs is underscored. More importantly, this document establishes the fact that "the most important contribution of immigration to the EU economy and competitiveness will be

43 Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, " The European Interest: Succeeding in the Age of Globalization," , Brussels, 3.10.2007 COM(2007) 581 final,

http://ec.europa.eu/commission_barroso/president/pdf/COM2007_581_en.pdf.

44 COM(2008) 359 final, "A Common Immigration Policy for Europe: Principles, actions and tools", 17.6.2008, p. 3. http://eurlex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2008:0359:FIN:EN:PDF.

to help, alongside and as an essential complement of the Lisbon Strategy for growth and jobs, to fill in arising and future labour and skill gaps on the EU labour markets."[45]

6.3 Highly-Skilled Migration and the Blue Card in the Euro-Mediterranean Context

In this evolving context, a major watershed in the EU strategy on economic immigration has been the new focus on high-skilled migration. In October 2007, re-emphasising the importance of fostering jobs and growth and the contribution of migration to EU economic competitiveness, the Commission's proposal for a Directive on an EU Blue Card (see description below in Section 6.3.3.), later adopted in May 2009, underlined the importance of attracting highly-skilled migrants in the international competition for skills and talents. The proposal, which is anchored in the Lisbon Strategy as well as in the broader framework of the EU strategy on economic immigration, adopts a "needs-based approach". Its objectives are not only to enhance the EU's economic competitiveness[46] and optimise the flexibility of labour markets, but to increase the positive impact of highly-skilled migration on developing countries.[47]

In order to assess the potential implications of the Blue Card for Arab Mediterranean Countries, it is important to first look at highly-skilled migration in Europe in general and its patterns, and then elaborate on the factors that attract highly-skilled employment to the EU. For this purpose, it is worth examining the skill level of AMC migration in Europe, its trends, location and the reasons behind the successful attraction of highly-skilled migrants. This will be used as a base to inquire into the possibility of matching the growing labour demand in the EU and the growing labour supply in AMCs from both labour markets in the origin and host countries. Based on this analysis, the description of the main characteristics of the Blue Card such as it was approved in May 2009 will allow us to reach some conclusions as to whether that instrument is suitable and attractive enough to satisfy the need for highly-skilled migration to Europe and, in particular, whether it will attract highly-skilled migration from AMCs.

6.3.1. EU and AMC Skill Profiles: What Scope for a Supply and Demand Match in the Mediterranean?

Europe is made up of many different countries and different labour markets, but at the aggregate level the data presented by the European Employment Report 2008 are conclusive: third-country workers, and in particular immigrants from AMCs, for the most part hold unskilled positions (see also Sections 4.2 and 5.2). In the EU-15 (the relevant reference, since it includes all main countries of destination of migration) slightly less than 50% of third country migrants hold low-skill positions, more than 30% have medium-skill positions and fewer than 20% are in high-skill positions. Among AMC workers, and in particular those for North Africa, the percentage of highly-skilled is substantially lower, and the share of the low skilled reaches 60% (see Figure 6.3.1.1).

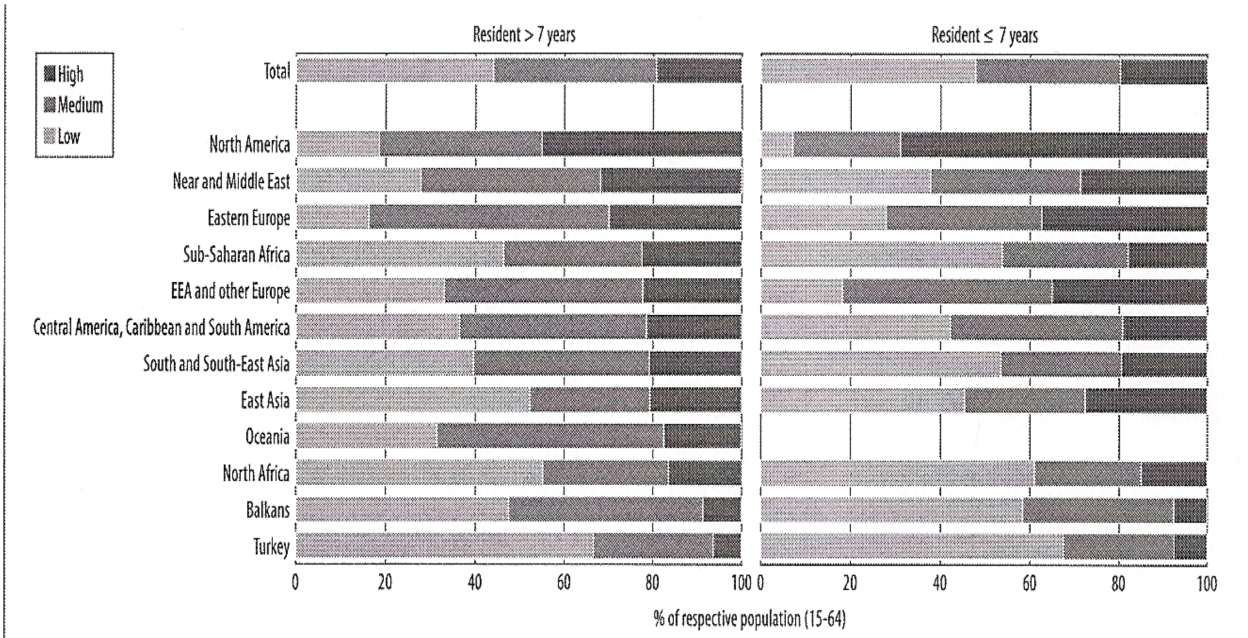
45 See MEMO/08/402 Brussels, 17 June 2008, A Common Immigration Policy for Europe, 1-5, p. 5.

46 See Memo 07/423, Brussels, 23 October 2007, http://eur-lex.europa.eu/smartapi/cgi/sga_doc?smartapi!celexplus!prod!DocNumber&lg=en&type_doc=COMfinal&an_doc=2007&nu_doc=637.

47 In order to avoid the negative effects of skill drain in origin countries, it proposes ethical recruitment procedures, limiting of active recruitment procedures in origin countries afflicted by brain drain, as well as encouraging circular, and thereby return migration.

As Figure 6.3.1.1 shows, skilled migrants in Europe come mainly from North America (70% of recent immigrants are highly-skilled), and Eastern Europe (38% of recent Eastern Europeans immigrants are highly-skilled). As shown in the right column of that Figure, recent immigration from the North Africa AMCs has not improved the situation. On the contrary, the more recent immigrants, those with less than seven years of residence in the EU destination countries, include a higher percentage of low-skilled migrants.

Figure 6.3.1.1: Skill level of non-EU born aged 15-64 by region of origin in the EU, 2007



Source: DG EMPL calculations based on Eurostat, EU Labour Force Survey annual data.
Note: BG, DE, IE and UK excluded. Data for non-EU-born resident ≤ 7 years from Oceania not reliable and from North America uncertain due to small sample size.

Source: Employment in Europe 2008, p. 60

In the near future, there is not doubt that Europe will need an increased inflow of skilled labour. The Commission Communication "New Skills for New Jobs. Anticipating and matching labour market and skills needs"48 highlighted this point in a context of economic crisis and transformation of the economic model. In this regard, the preparatory CEDEFOP (2008) report on *Future Skill Needs in Europe*, even if it was written before the current economic global recession, is relevant for understanding the long-term direction of European labour demand. Although the current recession will probably change national growth paths and will alter the sector distribution and productivity, the main findings of the modeling will not be affected. Thus, in the course of the coming five years more skilled labour will be needed. Whichever scenario is considered, a decline in low-skill demand (-1.9%) will be compensated for by an increase in medium-skilled (1%) and even more in high-skilled labour demand (2.4%)[49] (see Figure 6.3.2.1).

This modeling considers both replacement demand induced by age exit and the additional demand derived from new job creation in the economy. Even assuming that the additional demand was more sensitive to the ongoing recession, the replacement demand, which is mainly determined by exits from

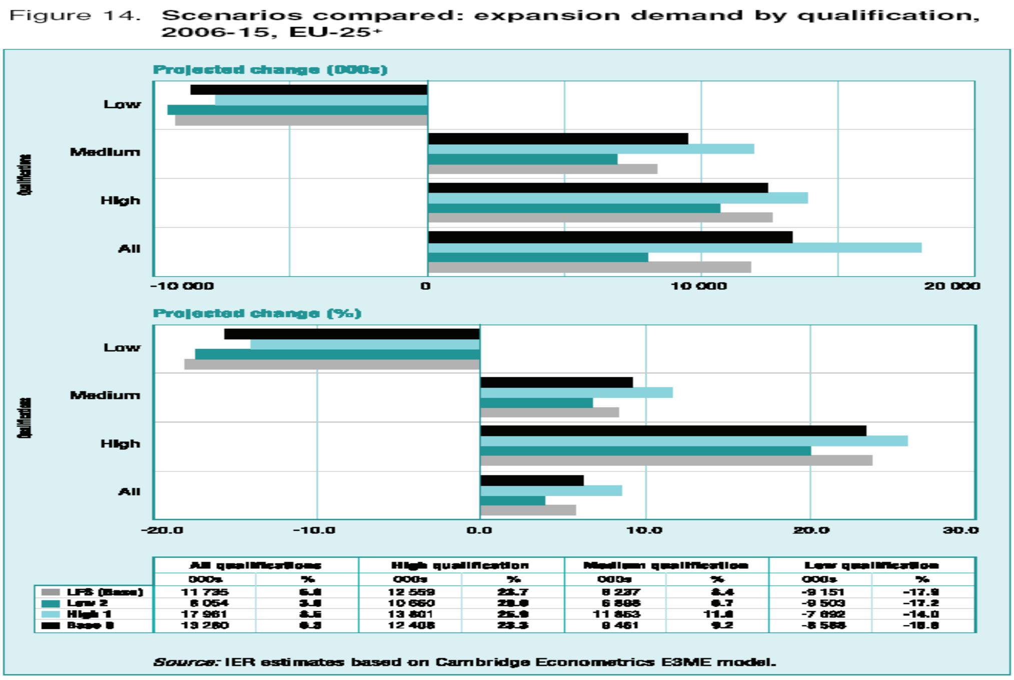
48 Communication from the Commission, COM(2008) 868, 16 December 2008, http://ec.europa.eu/education/lifelong-learning-policy/doc/com868_en.pdf. See also the Staff Working Document accompanying the "New Skills for New Jobs" Communication, SEC(2008) 3058, 16 December 2008, http://ec.europa.eu/education/lifelong-learning-policy/doc/sec3058_en.pdf.

49 Data from CEDEFOP (2008, Table 7 in p. 60).

the labour market induced by retirement, will constitute the larger component (80% of total projected increase in labour demand and, for the highest-skilled segment, 61%; see Table 2 in Venturini, Fakhoury and Jouant 2009).

Indeed, Europe is already experiencing an excess demand for skilled labour that is not satisfied by domestic supply and that is satisfied only partially by the labour supply coming from Eastern European countries. In the not so distant future labour supply from the new Member States will not be available for migration anymore, and, as could have been predicted before the recent recession, there will be an open demand for high and medium-skilled migrant labour.

Figure 6.3.2.1 Scenarios compared: expansion of demand by qualification, 2006-2015, EU-25



Source: CEDEFOP, Future Skill Needs in Europe, p. 63.

On the other hand, AMCs instead suffer from an excess supply of educated workers (see Section 2.4 above on graduate unemployment in AMCs). AMC labour force participation rates have a V shape with the highest participation rate among the illiterate and the university-educated both in urban and rural areas (for Egypt, for instance, see Assaad, 2007). Unemployment affects mainly the young (15-29), and increases with the level of education (see Section 2.4 and Table 2.4.1). It is frictional for the level below middle school and increases for general secondary, technical secondary, post secondary institute and university. The higher unemployment rates among the highly educated are common to all the AMCs, and the number of graduate unemployed has already reached 1 million and is increasing rapidly (and this without taking into consideration the high rate of inactivity among graduate women). Of course, not all the graduate unemployed are ready to emigrate, and in particular not all unemployed women are ready to do so: many of them, as in Egypt or Jordan, are in search of a job in the public sector. This notwithstanding, AMCs provide an available pool for recruiting foreign skilled labour because there is an available graduate labour supply and, in the foreseeable future, a lack of sufficient labour demand for skilled workers. From an European perspective, this matching of EU medium- and highly-skilled labour demand and AMCs excess labour supply would partially dampen the main factor for social instability in the region, and hence have positive externalities for Europe by preventing spill-over into the neighbouring European countries. To this extent, investment in skill development and legal recruiting and migration schemes for AMC labour force has the characteristics of a public good for Europe.

Now, whereas the AMC supply of labour seems to match the European demand, a major problem is the question of whether the quality of the human capital and skilled labour produced in AMCs is the type of quality demanded in Europe. One of the standard elements of all diagnosis of AMC labour markets relates precisely to the mismatch between skills endowed through the education system and those demanded by the labour markets, be it national or international (see Section 1.2 on low qualification of the labour force)[50]. One of the main weaknesses of the educational systems in the MENA region is the type of specialization among the highly-skilled which is overly concentrated in the humanities and social sciences (76.2% of the university students are in the humanities and social sciences in Egypt, 75% in Morocco, 60% in Lebanon, 57.4% in Syria, 56% in Algeria, 50% in Tunisia[51]) with too few students in the scientific or technical disciplines or in vocational training programmes. According to Corm (2009, p. 29) in the MENA region the total share of students who went through vocational training in 1999 was only 20%, while for instance in Turkey the corresponding number was 47%. This is an important question mark to recall in matching supply on one side of the Mediterranean and demand on the other.

Another relevant factor has to do with the different response of immigration policies to the global economic crisis. Indeed, if we look into national immigration policies, we see how many European countries have reduced migration quotas or made more difficult the granting of a work permit as a response to the crisis (see, for instance, the examples of Italy and the UK), whereas Anglo-Saxon countries such as Canada or Australia or even the United States have not introduced any singnificant change in their migration policies.

In this context, the question is whether the new Blue Card established by the EU to attract skilled migrants in appropriate to achieve that goal, in particular as regards AMCs. So far, the EU has not fared well in the global competition for skilled labour, and a look at the factors attracting high-skilled migration will help to explain why.

6.3.2. General Factors Attracting Highly-Skilled Migrants

Whereas on average 25.3% of the immigrants in the OECD countries hold tertiary education, in Europe only the United Kingdom (35%) and more recently Ireland (41%) stand high in this respect (OECD 2008, p.58). With these two exceptions, all other European countries range in between 24% (Sweden) and 11% (Austria) and this consequently implies a negative immigrants' qualification effect, namely a downgrading of total skill composition (see Table 1 of Thematic Background Paper, Venturini, Fakhoury and Jouant 2009).

As for AMC migrants in particular, as indicated above (Section 4.2) the main destination countries for skilled migrants from the AMC countries are the US, Canada and the Gulf countries. Europe has failed to attract them and in order to explain this it is worth exploring the main factors attracting highly-skilled migrants.

Skilled migrant location is decided by the different job opportunities (and other "social amenities") available to migrants in various labour markets and by the different channels of access to these opportunities. The first factor in attracting foreign skilled migrants is language, which gives easier access to information, better selection and makes the immigrants' quality of life less strenuous. The United Kingdom and Ireland in Europe and the US, Canada and Australia hold an advantage here because skilled migrants – even if educated

50 For a thorough analysis of this question, see World Bank 2009.

51 World Bank 2009, p.44.

in the country of origin – are frequently fluent in English, which is the most widely spoken language in the world, but much less so in Maghreb countries, where French still prevails (this would explain the Maghreb high-skilled migration stream to Europe, and in particular to France). The second factor is the educational system**,** which attracts foreign students and thus potential migrants. The United Kingdom, the US and Canada have a long tradition in higher-educational training, attracting not only third-country nationals, but also a large number of European students. France, similarly, attracts students from its former colonies. The third factor is the result of the special historic, economic and political ties which derive from historical relations frequently connecting two countries: for instance those ties between France and Maghreb countries. Such connections make it easier to find a job and reduce the cost of migration.

The aforementioned three factors ease the migration of educated labour, but the main driver of attraction is the skill-wage premium offered in the destination country, which pushes skilled migrants from many countries, including continental European ones, to choose the US or the UK, where wage dispersion is large and wage skill premium higher.

A selective migration policy is another factor to be taken into consideration. A selective immigration policy is made by the quota system which selects migrants according to skill gaps and thus creates a process of virtuous immigration in the destination country. The lack of a selective immigration policy in continental Europe is only one, but not the main cause, of the prevalence of low- and medium-skill migration. When for instance, in the 1990s, the German government tried to attract Indian engineers, the wage premium was not rewarding in comparison with competing offers available in countries where the cost of migrating was, in any case, lower given the previous immigration tradition and other socio-cultural factors.

So if the European Union wants to attract more skilled migrants it should start with a selective migration policy remembering that this is a necessary but not a sufficient condition to bring about skilled migration inflows. Other instruments including student programmes, degree recognition, entitlements granted with the work permit and bilateral agreements will also have to be implemented if a higher-skill wage premium is impossible given the wage structure of the economy.

6.3.3. The Blue Card as a Scheme for Highly-Skilled Migration in the Euro-Arab Mediterranean Context

The EU Blue Card Directive was adopted by the Council in May 2009 (with a two year period for its transposition to national law) as part of a plan for defining and facilitating "the conditions of entry and residence of third-country nationals for the purposes of highly qualified employment".[52] It is important to keep in mind that the Directive is in line with the Lisbon Strategy objectives that aim at addressing skill shortages and the labour needs of EU Member States with a view to making the EU labour market more competitive and fostering economic growth. Hence the Directive should be interpreted as a logical extension, as well as a major component of EU economic migration strategy. At the same time, given the difficulties for the definition of a common EU migration policy, it has to be seen as a compromise and a starting point in a learning process rather than as a ready-made instrument. In any case, it is clearly not meant at all as a recruiting system for highly qualified migrants.

52 See Council Directive 2009/50/EC of 25 May 2009, on the conditions of entry and residence of third-country nationals for the purposes of highly-qualified employment.

The Directive lays the foundations for admission for highly-skilled migrants, the issuance and withdrawal of the Blue Card, highly-skilled migrants' economic and social rights and, finally, their residence in EU member states. For the sake of clarity, it defines the EU Blue Card as "the authorisation bearing the term 'EU Blue Card' entitling its holder to reside and work in the territory of a Member State under the terms of this Directive".

To apply for a Blue Card, a professional will need either a university degree that has taken at least three years to complete or five years work experience in the relevant sector; a binding job offer or a valid work contract for at least one year period from a European employer, who will have to certify that the post cannot be filled from within the EU; a salary offer that is at least 1.5 times the average prevailing wage (gross annual salary) in the country concerned; as well as a valid travel document or visa and a health insurance.

The EU Blue Card is valid as a work permit for a period of one to four years, with the possibility of renewal. It also grants the card holder equal social and economic rights as nationals in various areas (pensions, housing, healthcare, working conditions…). If a card-holder loses his or her job, he/she will have three months to find another one before losing his/her work permit. It grants free access to the entire territory of the member state concerned within the limits provided by national law and, after an 18-months period, the right to move to any other participating EU Member State if he/she can secure a job there, but the new host country has the right to reserve acceptance of this transfer (this makes the transfer almost as difficult as a new application for the new country). It also recognizes that "favourable conditions for family reunification and for access to work for spouses should be a fundamental element", entitling family reunification within six months of obtaining the card. The UK, Denmark and Ireland do not participate in the EU Blue Card system.

It is important to stress that the Blue Card has various advantages. Thus, it provides for a minimum level of legal and policy harmonization among EU Member States regarding highly-qualified employment. It also creates the mechanisms for a fast-track procedure enabling highly-skilled migrants to take up highly-skilled employment. Moreover, it bestows more rights on highly-skilled migrants in terms of mobility inside the EU, equal treatment with nationals regarding social assistance, tax benefits and recognition of diplomas, and access to the labour market. Finally, it envisages more flexible procedures allowing family reunification and work access for spouses. It is important to add that it establishes "implementing measures" and reporting obligations; hence suggesting that the policy instrument is to be assessed and monitored.

However, the Blue Card as an instrument for the promotion of highly-skilled migration to the EU has inherent weaknesses and limitations. It must suffice here to mention the following concerns:

- The Blue Card project is conditional upon a contract or work offer and does not provide a right of first entry for a highly-skilled migrant (Guild 2007, p. 4). This suggests that the EU has failed to reach a minimal consensus and a level of harmonisation on the conditions for first entry and the residence of economic migrants who come for the purpose of employment or self-employment.
- Although it bestows upon its holder various economic and mobility rights, it also presupposes restrictive prerequisites that limit its attractiveness. For instance, in the case

that temporary unemployment should occur for a period exceeding three consecutive months or if it occurs more than once, the EU Blue Card is withdrawn.[53]

- The fact that it gives more privileges in terms of family reunification to the highly-skilled migrants who have not lived in the EU, as opposed to third-country nationals who are established residents of the EU, is controversial.
- More importantly, it is not clear whether and how the Blue Card is an instrument that excludes or paves the way for an EU citizenship and, if the Blue Card is to be understood as a gateway to citizenship, how do divergent citizenship laws in EU member states and the Blue Card complement each other?
- Although it explicitly targets the necessity of avoiding brain drain and of establishing ethical recruitment procedures so as to "minimize negative and maximize positive impacts of highly skilled immigration on developing countries in order to turn 'brain drain' into 'brain gain'",[54] concerns have been raised about whether the Blue Card could negatively impact on origin countries as not enough empirical work has been done on the effects of brain drain and how the latter occurs.
- From a broader angle, the Blue Card raises the question of whether future migration trends in EU labour immigration would be more focused on highly-skilled and selective migration. In this regard, analysing the Blue Card as an instrument for the implementation of the Global Approach to Migration casts doubt on the *globality* of the approach itself. This is why it has been argued that Europe needs instead "a common policy for all types of labour migration, be it unskilled, semi-skilled or highly-skilled" (Baldwin-Edwards 2009, p. 135) and not partial instruments addressing specific migration aspects.
- Despite the fact that the EU Blue Card Proposal has been adopted as Council directive, the UK, Denmark and Ireland did not adhere to the proposed approach. Moreover, the UK has already a quite efficient point system for skilled labour recruitment. This not only draws attention to the lack of coordination and the difficulties relating to shaping a common European labour migration policy, but also casts some doubt upon the credibility of the EU Blue Card as a policy instrument capable of pooling all EU actors together. This, combined with the application and acceptance procedure for the transfer of the Blue Card to another European country, limit the potential attractiveness of this instrument as an EU-wide entitlement).

6.4. The Euro-Mediterranean Partnership and the European Neighborhood Policy: Adequate Tools for an External Migration Policy?

Besides the articulation between EU migration policy and the needs of its labour markets on the one hand and the development needs of partners (and in particular AMCs) on the other hand, another relevant field of analysis is the articulation between EU cooperation policy with those countries (in particular the Euro-Mediterranean Partnership and the European Neighbourhood Policy) and its migration policy towards them, and more specifically to what extent those cooperation instruments incorporate and implement the Global Approach to Migration.

53 See Chapter IV, Article 13 of the Directive.

54 See Preamble Article (22) of the Directive.

The need for "a comprehensive approach to migration addressing political, human rights and development issues in countries and regions of origin and transit" was already stressed in the Tampere European Council's conclusions (1999). Thus, the latter emphasizes that "this requires combating poverty, improving living conditions and job opportunities, preventing conflicts and consolidating democratic states and ensuring respect for human rights, in particular rights of minorities, women and children". In many respects, those general objectives, considered as causes of undesirable immigration to the EU, match the Euro-Mediterranean Partnership's (EMP) declared aims.

However, paradoxically, the consideration of migration issues both in the Barcelona Declaration and in the Euro-Mediterranean Association Agreements (EMAAs) between the EU and Mediterranean Partner Countries was quite limited in the first place, except in the field of non-discrimination with regard to legally residing migrant workers (see Appendix of Thematic Background Paper, Venturini, Fakhoury and Jouant 2009). Only in the last few years, after the Barcelona Summit marked the first decade of the Euro-Mediterranean Partnership (1995-2005), have migration issues come to the fore in Euro-Mediterranean co-operation, with the integration in 2005 of a fully new pillar of cooperation in Justice and Home Affairs (first set in place in the Euro-Mediterranean Ministerial Conference held in Valencia in April 2002).

In the Barcelona Declaration establishing the Euro-Mediterranean Partnership, migration was only mentioned in the chapter on the "Partnership in Social, Cultural and Human Affairs", and not at all in the "Economic and Financial Partnership" chapter. As far as migration is concerned, the Barcelona Declaration's implicit rationale was that migratory pressures should be tackled through job creation and development (which, in turn, would be a indirect result of trade liberalization and structural reform), combating irregular immigration and protecting the rights of legal immigrants.[55] But no specific policy with regard to the migration challenge and its various dimensions was foreseen. The establishment of schemes for legal migration was certainly the missing link here.

In the subsequent Association Agreements, it is clear that migration or human mobility at large was not a priority of the Partnership at the time the EMAAs were drafted. Interestingly, the EC-Algeria Association Agreement is the only noticeable exception in this respect, as article 1.2 among other objectives includes the "facilitation of human exchanges, particularly in the context of administrative procedures". As the last EMAA to be drafted (its text was agreed in 2002, whereas the first one to be agreed, for Tunisia, dated back to 1995), it witnesses the increasing importance of this issue in Euro-Mediterranean relations.

The EMAAs dealt with migration issues under chapters dedicated to "Cooperation in Social and Cultural matters". In those chapters, some specific provisions related to migration are set out.[56] However, it is worth noting that no considerations for labour needs or for the nature and quality of permit of stay or procedures or conditions for admission were included in the EMAAs. Notwithstanding this, one of the explicit priorities in the field of social cooperation was reducing migratory pressures ("root cause approach"): "Reducing migratory pressure, in particular by creating jobs and developing training in areas from which emigrants come; resettling those repatriated because of their illegal status under the legislation of the state in question".[57] Each EMAA foresees a regular social dialogue which includes migration matters; however, the reciprocal minimal commitment in this respect targets the social aspects of migration and does not make an economically- or labour-centred

55 References to migration in the Barcelona Declaration "acknowledge the importance of the role played by migration in their relationships. They agree to strengthen their cooperation to reduce migratory pressures, among other things through vocational training programmes and job creation programmes. They undertake to guarantee protection of all the rights recognised under existing legislation of migrants legally resident in their respective territories. In the area of illegal immigration they decide to establish closer co-operation. In this context, the partners, aware of their responsibility for readmission, agree to adopt the relevant provisions and measures, by means of bilateral agreements or arrangements, in order to readmit their nationals who are in an illegal situation. To that end, the Member States of the European Union take citizens to mean nationals of the Member States, as defined for Community purposes."

56 For an exhaustive overview of those provisions, refer to the Thematic Background Paper (Venturini, Fakhoury and Jouant 2009).

57 Article 71 of the EMAA EC/Tunisia – same provision in the EMAA EC/Morocco . See also article 73 of the EC/Algeria EMAA which covers a larger scope of priorities related to migration. See article 82 of the EMAA EC/Jordan, as well as articles 63 of the EMAA EC/Egypt and Lebanon.

dialogue mandatory.[58] As a forum for such dialogue, specific working groups (subcommittees) on migration and social affairs have been established in the framework of the EMAAs with all the AMCs but Syria. But sectoral policy dialogue on social issues has been too focused on the rights of established migrant workers and migration,[59] and lacks any institutionalised, legally-binding mechanism allowing for systematic and structured follow-up and monitoring (in fact, Sub-Committees have no decision power).

However, a new impetus inspired by the Global Approach to Migration promoted by EU stakeholders has been played out in the framework of the Euro-Mediterranean Partnership in this field since 2005, both as a consequence of the new pillar on cooperation in Justice and Home Affairs and of the implementation of the European Neighbourhood Policy. Indeed, in its launch phase the European Neighbourhood Policy raised new expectations regarding human mobility among EU neighbours.[60] Contrary to the initial EMP which mainly addressed the integration of third-country nationals and the fight against irregular migration, the European Neighbourhood Policy accentuates the importance of an integrated approach to migration in the EU-Arab Mediterranean relations including the movement of persons. In the Action Plans, new opportunities for legal economic migration are envisaged as part of a balanced approach and a positive option for both origin and host countries. Thus, the ENP strengthens the foreign agenda of migration and introduces mutual commitments with a view to developing incremental joint migration management in the "illegal" but also the legal aspects.

Indeed cooperation in the field of justice, security and migration is at the top of the agenda of the ENP. For instance, the European Commission, in its 2006 Communication "On Strengthening the European Neighbourhood Policy",[61] identified the following "action points" concerning "Mobility and migration":

- Visa facilitation, removing obstacles to legitimate travel, e.g. for business, educational, tourism, official purposes.

- Ensure well-managed mobility and migration, addressing readmission, cooperation in fighting illegal immigration, and effective and efficient border management.

In its 2007 Communication "A Strong European Neighbourhood Policy"[62] the European Commission noted that "the promotion of mobility will go hand in hand with the commitment of our partners to increase security and justice and fight illegal migration, with efforts to strengthen our neighbours' capacity to deal with migratory flows to their countries, and with the security of documents." Therefore, it urged the EU Council and the European Parliament to adopt "its 2006 'package' on legislative proposals aiming at revising the European Visa policy, ensuring a high level of security within the common area and simplifying the procedures for visa applicants."

It must be also stressed that this issue is one of the priority areas of the ENP Regional Indicative Programme 2007-2013[63] which identifies a number of concrete projects and programmes. Legal migration is part of each of the Action Plans negotiated with the AMCs included in the ENP. The ENP

58 See article 69 of the EC/Tunisia EMAA and correspondent provisions in the others agreements.

59 For a complete list of Sub-Committees, see European Commission (2008, pp. 33-35).

60 The EU Commission Communication on "Wider Europe" (2003) stresses that: "The EU should aim to develop a zone of prosperity and a friendly neighbourhood – a 'ring of friends' - with whom the EU enjoys close, peaceful and co-operative relations. In return for concrete progress demonstrating shared values and effective implementation of political, economic and institutional reforms, including in aligning legislation with the acquis, the EU's neighbourhood should benefit from the prospect of closer economic integration with the EU. To this end, Russia, the countries of the Western NIS and the Southern Mediterranean should be offered the prospect of a stake in the EU's Internal Market and further integration and liberalisation to promote the free movement of – persons, goods, services and capital (four freedoms)".

61 COM(2006)726 final, 4 December 2006, http://ec.europa.eu/world/enp/pdf/com06_726_en.pdf.

62 COM(2007) 774 final, 05/12/2007, http://ec.europa.eu/world/enp/pdf/com07_774_en.pdf.

63 ENPI Regional Strategy Paper (2007-2013) and Regional Indicative Programme (2007-2010) for the Euro-Mediterranean Partnership, http://ec.europa.eu/world/enp/pdf/country/enpi_euromed_rsp_en.pdf.

objectives are much more articulated, global and ambitious than those of the EMP. Morocco and Tunisia are certainly the countries where the Action Plans are the most advanced in this respect, but management of migration flows as well as visa facilitations are on each of the partners' agenda, although implementation is yet far from satisfactory for the partners. So the statement that the ENP constitutes an important "policy shift" towards the Southern Mediterranean partners (Del Sarto and Schumacher 2005) on the basis of which the Euro-Mediterranean Partnership has been re-stimulated is fully warranted in the field of migration.

This shift has been echoed as well at the multilateral level. The Five Year Work Programme of the Barcelona Summit (28 November 2005) called for enhanced cooperation in the fields of Migration, Social Integration, Justice and Security through a comprehensive and integrated approach.

This chapter contains 6 objectives, among which:

a) The promotion of legal migration opportunities (facilitation of the legal movement of individuals, recognising that these constitute an opportunity for economic growth; fair treatment and integration policies for legal migrants; facilitation of the flow of remittance transfers; and recognition of the need to address "brain drain");
b) A significant reduction in the level of illegal migration (trafficking in human beings and loss of life through hazardous sea and border crossings);
c) To contribute to these objectives, it was decided, among other measures, to:
d) Hold a Ministerial meeting to discuss all issues pertinent to migration;
e) Develop mechanisms for practical cooperation and sharing experiences on managing migration flows humanely, (deepen dialogue with countries of origin and transit and explore options for providing assistance for countries of origin and transit);
f) Promote schemes for safer, easier, less expensive channels for the efficient transfer of migrants' remittances;
g) Develop ways to assist capacity building for those national institutions in partner countries dealing with expatriates;
h) Promote legal migration opportunities and the integration of migrants;
i) Enhance cooperation to fight illegal migration. This cooperation should involve all aspects of illegal migration, such as the negotiation of different kinds of readmission agreements, the fight against human trafficking and related networks as well as other forms of illegal migration, and capacity building in border management and migration.

On the spur of this momentum, the First Euro-Mediterranean Ministerial Meeting on Migration was held in Albufeira (Algarve) on 19 November 2007 under the Portuguese Presidency.[64] In this meeting, political and operational conclusions were approved. Facilitating legal movement is considered as one of the key elements of the cooperation "being aware of the globally positive effect of legal migration in terms of development." It was therefore proposed to "analyse the possibilities of facilitating and simplifying legal migration procedures for workers in demand, in order to improve legal channels for migration." These efforts would focus on "different categories of legal workers and could also include different forms of mobility such as circular and temporary migration, taking into account the needs of the Euro-Mediterranean countries labour markets as well as in terms of development." "The needs of the countries of origin in terms of transferring competences and alleviating the consequences of the brain drain that migration can represent" and "the possibilities of facilitating and simplifying legal migration procedures for workers in demand, in order to improve legal channels for migration" were also taken into account. A series of measures were adopted, such as

64 Ministerial Conclusions of the first Euro-Mediterranean Ministerial Meeting on Migration, 2007-11-19

http://www.eu2007.pt/UE/vEN/Noticias_Documentos/20071119Conclusoeseuromed.htm.

the creation of a working group on the migration aspects of the labour market (held within the EuroMed Migration II regional project), the introduction of training courses for migrant workers, pre-departure professional training and linguistic courses for potential migrants; a seminar on the transfer of funds and micro-credit opportunities; training courses for the countries of transit on methods for the detection and identification of false or falsified and counterfeit identity and travel documents; an enhancing capacity building related to departure flows and on strengthening the relationship between fighting illegal migration and the respect for the relevant international instruments. The Ministers made a commitment to maintaining regular meetings, through the establishment of task forces at the level of senior experts and officials to implement all the actions and supervise progress. Also, the link with migration and development in the Partnership was stressed as was the need to address the root causes of migration particularly poverty, unemployment, and the development gap**.** Those conclusions show that a genuine shift in the approach to migration and its link with development and labour needs in the Euro-Mediterranean framework – at least at the rhetorical level.

A parallel dynamic is on course regarding employment policies in the framework of the Euro-Mediterranean Partnership. After two years of preparations, the first Euro-Mediterranean Conference of Ministers of Labour and Employment was held in Marrakech in November 2008.[65] The Ministers addressed "concrete initiatives and proposals to promote employment creation, the modernisation of labour markets, and decent work", committing all partners of the Euro-Mediterranean Partnership to a "Framework of Actions which would contribute to developing a genuine social dimension within the Euro-Med agenda". The Ministers also acknowledged that, in addition to high economic growth rates, the situation calls for greater investment in human capital, training and employability, as well as concrete job creation measures and an improved environment for said investments. They further emphasised the interdependence between employment, education and training, social cohesion, economic development and growth and sustainable development and called for an integrated approach whereby economic, fiscal, employment, social and environmental policies, as well as education and training policies, would be defined and implemented together.

The Ministers then committed themselves to a regional Framework of Actions based on the objectives set out in the Annex to the Conclusions, namely: i) create more jobs, also using active employment policies; ii) enhance employability and human capital; iii) create better jobs and decent employment opportunities; iv) promote equal opportunities for men and women; v) integrate more young people into decent jobs; vi) design a comprehensive strategy for transforming informal employment into formal employment; and vii) manage labour migration, taking into account job market needs on both sides of the Mediterranean.

Finally, the Ministers established a follow-up mechanism to monitor the implementation of the Framework for Actions, consisting of a Working Group that "will collect information and data on national trends and policy developments, identify and exchange best practices, as well as address issues which arise in the implementation of the Framework of Actions. The partner countries will provide the group with the information needed for drawing up during 2010 a follow-up report on progress under the Framework of Actions". This progress report will be based, in the case of the Mediterranean partner countries, on national action plans and progress reports to be submitted by 2009 and, in the case of EU member states, on the reports submitted within the framework of the EU's Lisbon Strategy. The Second Euro-Mediterranean Conference of Labour and Employment Ministers to be held in 2010 should be the occasion to take stock of progress and evaluate the implementation of this mechanism

But both dynamics, on migration and on employment at the Euro-Mediterranean level, certainly open up new perspectives for policy cooperation in this areas which might culminate, in time, with a

65 Conclusions of the first Euro-Mediterranean Conference of Employment and Labour Ministers, Marrakech, 9-10 November 2008,

http://ec.europa.eu/external_relations/euromed/conf/employment_health_conclusions_1108_en.pdf.

true Euro-Mediterranean Employment and Migration Strategy finally able to address the issue of employment and labour migration at the regional level.

7. Proposals for Action and Policy Recommendations

7.1. Data and Research Gaps on Labour Markets and Migration in AMCs

As the literature review produced for this Study has shown (Marchetta 2009), there is a shortage of research on labour and migration in AMCs, and even more so on the interaction between both. Evidence from the literature comes mainly from other regions, and even this is very scarce in some respects, for instance the impact of migration on labour markets of countries of origin. So a first step in facing the huge challenges of employment in AMCs and in addressing the complex issue of migration in the region is to know more about both its magnitude and characteristics. This Study makes a contribution in this direction by collecting best available national data according to a common template and systematizing the existent literature on the impact of migration on labour market, providing a possible analytical framework that could guide future research on this topic

Indeed, despite recent improvements in the availability and the quality of employment and migration statistics for AMCs any serious analysis of labour markets and migration in Arab Mediterranean Countries is seriously hampered by the unavailability of data across the region, the unreliability and inconsistency of available data and the difficulty of comparing country to country. Discrepancies between data gathered by countries of destination (in particular OECD countries, since Gulf and other Arab countries are notorious for the shortcomings of their immigration statistics) and those produced by countries of origin are enormous (see Table 3 in Fargues 2009, p. 479), and not only due to irregular migration. One particular shortcoming of existing data is the unavailability of statistics broken down by regions or lower administrative units within a country, which would allow for a much more sophisticated cross-sectional analysis, for instance, on the impact of remittances on labour market performance (wages, labour participation, unemployment rates…).

In terms of issues, some obvious research gaps are related to the behaviour of the informal sector and how it interrelates with the formal labour market and international migration (informal employment is a true black hole of knowledge for labour markets in the region), the interaction between rural-urban internal migration and international migration (urban labour markets, often informal, tend to play an important role in this sequence) and the extent and behaviour of inter-Arab migration (an important part of it still unregistered). Finally, a more thorough analysis of education systems and skills acquisition, carried out too at the micro-level (through surveys on school to work itineraries and on the different tracks taken by those who ended up migrating) would offer important insights into the shortcomings of the educational system.

7.2. A Research Agenda for Labour Markets and Migration in AMCs

Given the difficulties of compiling basic information on labour markets and migration in AMCs for the National Background Papers and the lack of specific research focused on evidence from the region, the research agenda on labour markets and migration in AMCs should take a multilevel approach. This might include, in this sequence:

- A region-wide program to *produce* a complete set of standardised statistics on labour markets and migration based on national statistical sources (and, when applicable, international statistical data, such as the OECD migration database) using the same methodologies throughout the region for reasons of comparability. This would allow researchers to fill in the current gaps on the number of migrants, their destination, their education, sex and age profile, as well as basic variables on labour market performance (wages, working hours, unemployment, composition of labour force…). This programme would necessarily involve national State statistical services and could be designed and implemented in the framework of the current Medstat III regional programme, while being steered by the European Commission or Eurostat (adopting standard statistical cooperation methods employed within the EU). The template of statistics to be produced and a first approach to methodological issues could be usefully designed and developed with the advice of experts on labour markets and migration from across the region.

- A project to develop a set of complete statistics on labour and migration at the sub-regional level in one or two pilot countries, carrying out the relevant field surveys (due to the availability of Surveys, Morocco or Tunisia are good candidates in the Maghreb and taking into account regional dynamics Jordan would be a good candidate in the Mashreq, given the lack of the most basic surveys in Lebanon). The template of statistics could be the same as in the former proposal, and the project would be best implemented by a qualified research centre (or a consortium of an international research centre and a national one for each pilot country), if possible in close co-operation with national statistical institutes. The project should provide resources to carry out specific region-level surveys when needed.
- On the basis of the above-mentioned sets of pan-AMC and sub-regional labour markets and migration data, to undertake a wide-ranging study to test to what extent research and theories on migration flows and labour markets developed on evidence from other regions work for AMCs. Figure 5.1.1 offers a possible matrix of research questions to guide this research. This might usefully begin with an international seminar with experts on these issues from other regions and experts from the AMC region itself. The seminar could help develop a network of experts to work as the conveyor belts of the project: so far no real community of experts on labour markets or on labour markets and migration exists in the region (on migration, in contrast, there is already an emerging community, in particular around the CARIM).
- An inventory of migration policies implemented throughout the region (both n the EU and in AMCs), with a scientific assessment of their working and their impact through appropriate indicators and methodologies. This could serve as a basis for the transfer of best practices.
- Given the lack of knowledge on the informal economy and informal employment in AMCs, its workings and how it interrelates with the formal labour market and international (irregular) migration, a region-wide Study on informal employment (no such Study exists as yet) could provide useful policy guidelines not only for employment policies, but also for investment promotion and other economic policies. This Study should be based on household surveys.
- A comprehensive study on the magnitude and characteristics of inter-Arab migration, in particular AMC migration patterns to the Gulf countries and Libya, will substantially add to the knowledge we have of migration in AMCs and its economic and social impact.

7.3. AMC Economic and Social Policies

There seems to be quite a reasonably broad consensus on the national AMC policies needed to face the challenge of employment (see Section 3.3 and Section 4.4 or 4.5 of National Background Papers). Some fundamental guidelines are the following:

- Upgrading of national education and vocational education and training systems. Quality of education at all levels, orientation to labour market needs and the employability of youths and women should be at the centre of this strategy.

- Putting employment creation and productivity increase at the centre of all economic and industrial policies, promoting labour intensive activities and investments, but also high added value industries.
- Integration and coordination of public policies in four areas is required to render effective the national strategies to enhance creation of good quality: macroeconomic and fiscal policies, public investment and private sector promotion policies; education and training policies; social protection policies; and labour regulation policies. This coordination should take on an institutional shape, i.e. formal exchange and consultation between the respective competent Ministries at the national level.
- Extensive employment policy assessments should be carried out in every country to begin with, and monitoring and evaluation capacities be substantially strengthened. The working and impact of active labour market policies should be systematically assessed, and policies redesigned to achieve employment creation objectives.
- In-depth study on the obstacles to the labour market participation of women and the formulation of an strategy to remove these obstacles (such as public transportation and child caring facilities, for instance).
- Creating incentives to private sector firms to hire new graduates and women and also training for workers through tax rebates.
- Creating a set of incentives for transforming informal employment into formal employment (this could include a reduction of current high social security contributions).
- Establishment of social protection systems guaranteeing universal coverage, including unemployment insurance schemes. Emphasis should be put on the protection of workers rather than the protection of jobs (see Jaidi 2009, National Background Paper, Section 4.4).

7.4. EU Migration Policies

As AMCs need to undertake structural reforms to upgrade their economic policies in order to create an encouraging investment and business climate to attract foreign direct investment and to foster the private sector (i.e., to attract and stimulate the production resources they lack, capital and entrepreneurship). The EU then should upgrade the mix of policies increasing its competitiveness to attract the main production factor it will need in the coming decades – labour, and in particular skilled labour. A genuine structural reform of EU migration policies – both at the national and at the EU level – needs to be undertaken to that end. A multilevel strategy to address this policy reform should include the following measures:

- Provision for legal schemes allowing for permanent legal migration to the EU, and not only for skilled migrants. This might provide the basis for a more efficient cooperation strategy in migration matters between the EU and the AMCs. For a number of reasons (analyzed in Section 6.3.3), the recently approved Blue Card does not fulfil these requirements.
- In the framework of emerging EU migration policy, design and implementation of EU-wide schemes allowing for circular and temporary migration from AMCs. This could build upon current bilateral agreements in this field (see Section 4.2) and lead to true mobility partnerships. But it could also be implemented through liberalization of service provision through the temporary movement of labour (Mode 4 of the General Agreement on Trade on Services) agreed within the framework of on-going

negotiations based on the Framework Protocol on Services adopted by the Euro-Med Trade Ministers in Istanbul in 2004.

- In order to improve the comprehensiveness of the Global Approach to Migration and to remedy the gaps left by its instruments, it is important to:
    - Promote ratification by all EU countries of the UN Convention on Migrant Rights;
    - Enpower institutions and legal channels facilitating the recruitment of workers on both sides of the Mediterranean;
    - Draw the consequences of the existence of the Single Market for labour and devise work permits for labour immigrants valid throughout the EU;
    - Encourage visa and institutional policies that favour temporary patterns of migration and mobility; this should include the introduction of multiple-entry, multi-country visas and work permits;
    - Refine temporary migration programs and make them more attractive by guaranteeing social rights and the portability of benefits even if such programmes are only a labour strategy, and cannot solve, in the near future, the demand for income and jobs for all potential migrants;
    - Improve the recognition of educational degrees in the EU and create more institutional and legal synergies between academic institutions on either side of the Mediterranean;
    - Remove obstacles to family reunification, which may act as a factor for human capital development.

7.5 EU-Arab Mediterranean Countries Cooperation

The European Neighbourhood Policy and the new sectoral dynamics launched at the Euro-Mediterranean multilateral level by the first Euro-Mediterranean Conferences on Migration (November 2007) and Labour and Employment (November 2008) provide an enabling framework to implement the new “Global Approach to Migration” adopted in 2005 not only as a unilateral EU strategy, but as a cooperative framework for true co-development.

To make progress in this direction, some initiatives could be undertaken:

- The launching of national projects in the framework of the Neighbourhood Action Plans for 2011-2013 currently being negotiated with all AMCs (except Algeria and Syria) to support public employment services, to review and to modernize employment policies (a project of this nature has been announced for Morocco in the Concept note for the Action Plan 2011-2013 published for public information by the European Commission). These projects should include:
    - a review of national employment policies with a common template (the Bucharest Process, undertaken in 2003 in the framework of the Stability Pact for 9 South Eastern European countries, to review, assess, monitor, and coordinate national employment policies and public employment services could serve as a model;
    - technical assistance on employment policy-making, as well as capacity-building in managing labour markets, and in the review, assessment and upgrading of active labour market policies;
    - institutional strengthening of Employment Ministries and their policy-making capabilities, as well as of national Employment Agencies as labour market intermediaries.

- promotion of youth and female employment and the gearing of public employment services to promote such employment.

- Quick implementation of a regional Framework for Actions on Employment as agreed in the First Euro-Mediterranean Conference of Work and Employment Ministers in 2008; as seen with the European experience with the European Employment Strategy, scope for regional co-operation is great in this field. Common objectives and policy-making framework, with a region-wide system of multilateral progress monitoring by each partner, could provide the right incentives to share experiences and best practices, adopt effective policies and follow-up implementation with a technical perspective.
- In the framework of the Euro-Mediterranean Partnership, the undertaking of a region-wide review of the formulation and performance of national migration policies by AMCs and EU migration policy instruments in relation to AMCs in order to identify the institutional framework conducive to a synergy between the EU and AMCs in the labour migration field.
- A region-wide review and monitoring of the working and impact of current bilateral temporary and circular migration experiences,[66] assessing their economic, social and human dimensions, and detecting positive gains and outcomes could enhance cooperation and activate new cooperative dynamics in the Euro-Arab Mediterranean context.
- The establishment, within the legal framework of the Global Approach to Migration and the institutional framework of the Euro-Mediterranean Partnership, of a Skills Enhancement Fund aimed at addressing the issue of brain drain caused by the migration of highly-qualified workers from AMCs to the EU. This scheme, already foreseen in the European Commission's Green Paper on an EU Approach to Managing Economic Migration[67], might be designed as a skill development cooperation fund (funded by resources beyond those already available for each country under the European Neighbourhood and Partnership Instrument) whose amount would be calculated as a function of the number of skilled migrants from AMCs coming to the EU in a given period (for example, the last ten years). This fund would be earmarked for cooperation programmes aimed at 1) improving the skills of graduates staying in the county, 2) improving the quality of university programmes in the country, 3) increasing the number of graduates produced in the country (through scholarships), 4) encouraging the return of highly qualified migrants to their country of origin. This scheme should not be interpreted as a "training for migration" scheme, but just as a way to compensate countries of origin for a part of the resources they lose through migration, mitigate the negative impact of that loss and ensure that migration is ultimately not detrimental to the human capital of the country. It would add to the incentives AMCs have for investing in skill development of their labour force and, more importantly, to the resources they can mobilize for doing it.
- Establishment of a regional system for disseminating employment offers throughout the Euro-Mediterranean region in order to better match the demand and supply of labour.
- Establishing a Euro-Mediterranean programme of traineeships in European and AMC companies for AMC graduates and vocational training students.
- Establishment of an EU-wide scheme to encourage return migration to AMCs, in particular the return of skilled labour migrants, through appropriate incentives implemented at the EU Member State and AMC level, including the possibility of returning to countries of destination.

66 See Section 4.2 on circular migration.

67 COM (2004) 811 final, http://eur-lex.europa.eu/LexUriServ/site/en/com/2004/com2004_0811en01.pdf.

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Chapter II – Thematic Background Paper

The Impact of Migration on Labour Markets in ARAB MEDITERRANEAN COUNTRIES: A Bibliographical Review[68]

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Highlights

This paper provides an extensive theoretical overview of the rich array of effects that migration out of Arab Mediterranean Countries can produce on the labour markets of origin countries. Such a comprehensive overview is followed by a review of the – admittedly limited – existing empirical evidence, and a presentation of additional data that can be used to indirectly gauge the relevance of the various theoretical arguments. While there are still large knowledge gaps, the value of this paper is a broad analytical framework to systematize the findings for future research. We provide below a synthetic description of the main conclusions in the existing literature:

Migration softens the demographic pressure on the labour markets of AMCs

- The unemployment-reducing effect of migration is stronger for small-sized countries.
- This effect is strengthened by a medium-term indirect effect, with the influence of migration upon fertility choices, for the countries of the Maghreb.

Migration exerts little to no effect on the female participation rates in the labour market, which remain notably low in AMCs

- The positive income effect brought about by the receipt of remittances reduces the supply of labour.
- There is a strong cultural resistance to a more active female engagement in waged economic activities.
- The increase in female employment is mostly limited to family-run economic activities.

The *brain drain* does not represent a serious concern for most AMCs

- Local labour markets have still an inadequate capacity to absorb the existing supply of skilled labour.
- The *brain gain* mechanism is unlikely to play a substantial role for most AMCs
- Returns to skill are limited in most destinations, and the *brain waste* phenomena should not be overlooked.
- The demand stimulus determined by remittances has a limited job-creation effect.
- Remittances can fuel the import of foreign-produced goods, and job-creation is mostly limited to the non-traded sector.
- Investments financed by remittances and by return migrants can have a more relevant and long-lasting effect on employment opportunities.
- Remittances help loosen financial constraints on investments.
- Returnees to AMCs have a higher propensity to opt for entrepreneurial activities.

Introduction

Migration can profoundly reshape the labour market of migrant sending countries, which is influenced through a variety of closely intertwined channels, such as direct impact on the unemployment rate, indirect effects on incentives to actively look for a job – that can be mediated by the transfer of both financial and social remittances, and the influence on the sectoral structure of the demand for labour that can be induced by the influence that migration exerts on the pattern of consumption and investment. Contrasting views about the impact of migration on the labour markets of migrant-sending countries are expressed, ranging all the way from the expectation of a positive – and much needed – contribution due to the reduction in the unemployment rate, to concerns about the loss of relevant skills that could hinder or retard economic development. Changing perceptions of the economic consequences of migration can most probably be traced back to the complexity of the effects that migration unleashes on the labour market, whose relevance differs across migrant sending countries. This paper focuses mostly on emigration, and more particularly return migration; immigration is not considered here, unless it can be envisaged as a direct consequence of the emigration of native workers, e.g. replacement migration.

The variety of relevant channels entails that a broad research question about the impact of migration "is more appropriate, given the complexity of relations involved [than] a narrower question about, say, the impact of remittances only", as McKenzie and Sasin (2007) argue. The need for a holistic approach is further strengthened by the fact that in Arab Mediterranean countries the usual text-book distinction between the demand and the supply side of the labour market is somewhat fictitious, given the high incidence of self-employment.

Nevertheless, for the sake of analytical convenience, we pursue an indirect approach that aims at singling out the impact of migration on various facets of the labour market. This means that the impact of migration on main labour market outcomes, such as the level and the distribution of labour earnings, participation and unemployment rates, is not addressed directly, but rather we attempt to infer it from the influences that migration exerts on the demand and the supply side of the labour market. Admittedly, some of these intermediate effects produce contrasting influences on labour-market outcomes, so that our analytical approach might fall short of delivering an unambiguous conclusion. Still, given the limited empirical evidence that is available for these countries, we argue that our approach is valuable as it highlights the specific channels that deserve to be further investigated, and it warns against drawing conclusions from analyses that focus on one specific channel. As Sen (1989) famously put it, "in social investigation and measurement, it is undoubtedly more important to be vaguely right than to be precisely wrong".

Table 1 below provides a synthetic snapshot of the structure of the analysis that will be pursued in this paper; the four rows identify the features of the labour market that can be expected to be influenced by the emigration of native workers. As far as the supply side of the labour market is concerned, we will assess the impact of emigration on a country's endowment of labour, and how the behavior of the economically active population which does not leave the country is influenced by the process of migration. With respect to the demand side of the labour market, we will analyze how migration exerts an indirect influence due to the changes it induces on the prevailing pattern of household consumption, and through the investments and the choice of entrepreneurial models in the case of domestic firms. The columns of Table 1 conversely identify the various facets of emigration that can exert an influence on the labour market. We consider the effect due to the prospect of migration, by the actual migration of domestic workers and by their eventual return to their home countries. Furthermore, we analyze how remittances – intended both as the financial transfers made by migrants and as the transfer of ideas across countries – can influence the labour market. Indeed, though migrants' remittances are the most evident economic counterpart of the international mobility of workers for migrant sending countries, the role of social remittances that Levitt (1998) defines as "the ideas, behaviours, identities and social capital that flow from receiving country to sending country communities" could be substantial as well.

Table 1 Analytical structure of the paper

		Migration			*Remittances*	
		Actual migration	**Prospect to migrate**	**Return migration**	**Financial transfer**	**Social remittances**
Supply side of the labour market	**Endowments**	√	√	√	√	√
	Behavior	√	√		√	√
Demand side of the labour market	**Consumption patterns**	√		√	√	√
	Investments, entrepreneurship			√	√	√

Needless to say, not all the multifaceted aspects of migration can reasonably be expected to influence the demand or the supply side of the labour market, and Table 1 sets out the ones that we deem as most relevant, and that will be analyzed in this paper.

The paper is structured in two parts. The first part gives a review of the theoretical arguments: section 1 and 2 focus on the impact of migration on the supply side of the labour market, analyzing respectively the impact of migration on labour-force skill-composition, and the influence that migration exerts on the behavior of workers in the labour market. Section 3 and 4 shift the focus to the demand side, analyzing how migration reshapes the sectoral composition of the economic system, and the incentives and capabilities to undertake productive investments. The second part of the paper focuses on the existing empirical evidence for the Arab Mediterranean countries. Section 5 provides an overview of the salient features of migration out of Arab Mediterranean countries that are likely to mediate its impact on the labour markets. Then, Section 6 to 9 explore the empirical relevance of the various theoretical arguments through the analysis of existing evidence and relevant secondary data for the Arab Mediterranean Countries. Section 10, finally, summarizes the main findings of the previous sections and it will also offer some conclusions.

Part I- Review of the theoretical arguments

Supply side of the labour market

1. Labour force - endowments

The direct impact of the migration process on a country's endowment of labour crucially depends on the prevailing pattern of migration. When migration occurs mostly on a temporary basis, then the potential for migration to bring relief to the labour market – or to deprive it of valuable human resources – is clearly limited. By the same token, the influence of the prospect to migrate on the incentives to invest in education fades away when migration is predominantly temporary, as the responsiveness of the key educational decisions to the characteristics of the foreign labour market is positively related to the planned duration of the migration episode. A predominantly temporary or circular pattern of migration conversely increases the relevance of the arguments around the influence of return migration upon the labour market, as returnees can bring back home relevant skills acquired in the countries of destination. The arguments around the effects of remittances upon the labour market are conversely less sensitive to the prevailing pattern of migration, though the size of financial transfers tends to vary through the various phases of an individual migration episode.

1.1 Actual migration

When the stock of a country's migrants represents a sizeable share of its total population, then migration can produce non-negligible effects on that country's labour-force endowment, possibly alleviating the pressure on the domestic labour market. Moreover, even though the size of migration flows may be small compared to demographic factors, actual migration – and past migration – can have a relevant influence on the endowment of specific kinds of labour – such as health-care workers: this is perhaps the most often voiced concern among the possible adverse effects of migration upon origin countries. It is important to recall that some niches of the labour market are gender-specific, so that migration can have an uneven impact on different sectors of the labour market, if it is not gender-balanced. This can, in turn, produce effects in terms of gender differences in labour earnings, as the more mobile factor gains in relation to the less mobile one.

1.2 Prospect to migrate

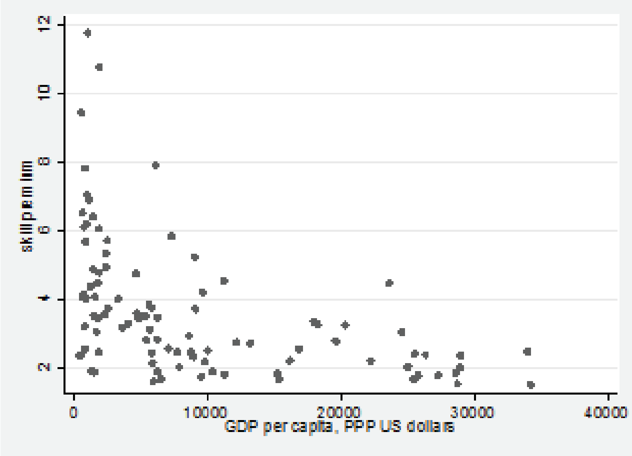
Migration exerts a substantial influence on a country's labour endowment, and here we provide a brief review of the theoretical understanding of this influence. The traditional literature on the so-called brain drain (Bhagwati and Hamada, 1974) emphasized the adverse static effects of migration upon the endowment of skilled labour, with its ensuing negative developmental impact. Such a prediction has recently been challenged by a variety of papers which shift the focus onto the dynamic effects of migration upon skill formation. Stark *et al*. (1997) argue that "higher prospective returns to skills in a foreign country impinge on skill acquisition decisions at home", and this influences the sending country as only a fraction of the would-be migrants who increased their private investments in education in response to the prospect of migration succeeded in turning that prospect into reality.

The effect of the prospect to migrate upon schooling investments is certainly positive if the dispersion of labour earnings, weighted for the probability of employment, across educational groups is higher at destination than it is in the migrant-sending country[69]. Figure 1.1 depicts the relative skill premium – defined as the ratio between the labour earnings of tertiary-educated workers and the labour earnings of the workers employed in occupations that require little to no formal education or training – against the *per capita* income level. This figure reveals that the relative skill premium is declining with the level of *per capita* income, and – as Figure 1.1 is based on gross labour earnings – the negative relationship between the skill premium and the level of income would be even stronger if one were to considers the effects of income tax, which tend to have a larger redistributive role in higher-income countries. Moreover, Figure 1.1 could overestimate the actual skill premium that highly-educated migrants enjoy in destination countries, because of the tendency for migrant workers to take up positions for which they are overqualified. On the other hand, it is fair to say that Figure 1.1 could overestimate the relative skill premium in lower income countries if better educated workers are exposed to a higher risk of unemployment than lower educated workers[70].

69 Although the empirical evidence shows that this is most often not the case, as skill premia are lower in higher-income countries (Freeman and Ostendorp, 2000; Grogger and Hanson, 2008), this need not cast doubts on the positive dynamic effects of migration upon human capital formation in the migrant-sending country, as educational decisions could be driven by skill-related wage differentials, rather than by skill premia.

70 Wahba (2005) shows that Egyptian workers with tertiary education face a higher risk of unemployment than workers with an upper secondary or technical education.

Figure 1.1. Relative skill premium and income level



Source: Bertoli and Brücker (2008)

The decision to invest in education is driven not by the actual return to education at destination, but by the *expected* return for the would-be migrant, and the two differ whenever the countries of destination pursue skill-selective immigration policies. These policies, which confer a higher probability of migration to better- educated individuals, increase the distribution of *expected* labour earnings at destination for potential migrants, inducing them to invest in education "in order to be eligible for emigration" (Mountford, 1997). As Stark and Wang (2002) provocatively suggest, the prospect of migration reduces the need to provide educational subsidies, as it increases the expected private return on schooling.[71]

Still, some recent theoretical and empirical contributions have introduced relevant *caveats* against the endorsement of excessive optimism. The expected income-schooling profile at destination, which drives the educational decision of would-be migrants, can be flattened by relevant confounding factors. Immigrants tend to be overqualified for the job positions that they take (Mattoo et al., 2008), and overrepresented in manual occupations.[72] Furthermore, Docquier *et al.* (2008) have shown that the theoretical predictions of the literature about the so-called *beneficial brain drain* is based an unwarranted hypothesis, as they regard the governments of migrant-sending countries as passive by-standers concerning the foreign demand for their talented workers. Governments can adjust their policies in response to the international mobility of highly-skilled workers, and Docquier *et al*. (2008) predict that governments will cut back public subsidies to education, as all this "implies far-reaching changes in the geographic incidence of the costs and benefits of publicly-funded higher education" (Justman and Thisse, 1997).[73]

Thus, the dynamic contribution of the prospect to migrate upon human capital formation in migrant-sending countries tends to fade away if migrants are poorly assimilated in the labour market at destination, when the country has a long-established migration history, and when the governments reduce educational subsidies to prevent an excessive leakage of fiscal resources with

[71] One could also argue that the prospect to migrate might influence the distribution of students across various disciplines, as it creates an incentive to invest in those fields which are demanded in the destination countries.

[72] Moreover, the income-schooling profile at destination tends to flatten over time, as the migration process gains momentum; such a change is due to the fact that an increase in the size of migration networks at destination has an uneven impact on migration costs across educational levels; low educated would-be migrants enjoy a greater reduction in migration costs than highly-educated individuals do (Munshi, 2003; McKenzie and Rapoport, forthcoming), and this flattens the net income-schooling profile.

[73] Docquier et al. (2008) predict that the reduction in public subsidies more than offsets the increase in the expected return to schooling induced by the prospect to migrate, thus worsening rather than improving the skill composition of the domestic workforce.

the migration of the highly educated workers. If this is the case, then the static negative effect due to the drain of the “best and the brightest” is unlikely to be offset by a substantial positive dynamic contribution to human capital formation. Nevertheless, this need not represent an actual concern for migrant-sending countries: if the domestic economy is unable to productively employ talented then their migration would not represent a worrying brain drain but it would rather be the consequence of a substantial mismatch between the higher-education system and the domestic labour market.[74] The migration of skilled workers would thus alleviate the pressure on the labour market, rather than represent a hindering factor in economic development.

1.3 Return migration

Return migration is currently depicted as one of the main channels through which migrant-sending countries can benefit from migration flows, as migrants can acquire higher education or relevant on-the-job experiences when abroad, and then employ them fruitfully upon their return. This statement (which applies mainly to scarce skills) should be mitigated, or even criticized: for example, the government of Egypt now fears that the current economic crisis in the Gulf will result in a massive return of migrants to Egypt, and an upsurge in unemployment. Return migration is advocated by EU member states as an implicit solution to their problem of integration and social cohesion, not to sending countries’ problem of development. The influence on the supply side of the labour market is direct if returnees complete their migration experience while they are still in their working lives. Such an effect is relevant if temporary – or circular – rather than the permanent migration representing the predominant pattern of international mobility of domestic workers.

1.4 Remittances

Remittances can influence the supply side of the labour market through a variety of channels. The receipt of remittances loosens the liquidity constraints that hinder investments in education (Cox Edwards and Ureta, 2003; Rapoport and Docquier, 2006). Note that this argument is closely related to the one that was depicted in section 1.1.1, as young members of recipient households have a higher probability of migrating than the rest of the population (van Dalen et al., 2005), due to already existing family networks in the country of destination. Thus, whether the positive income effects determined by the receipt of migrant remittances feeds up into a higher investment in education depends crucially on whether the prospect to migrate improves or worsens the incentives to undertake such an investment.[75] Remittances reduce – in the short run – the size of the younger cohorts entering the labour market, either through a higher retention rate in the educational system, or through increased migration.

Remittances can also produce a detrimental impact on human-capital formation, if they open up opportunities to undertake productive investments in family-run activities, which represent the use of the remittances that are supposed to deliver the greatest developmental contribution for the recipient countries (see Taylor, 1999 for a criticque of this position). Child workers are mostly employed in family-run economic activities – and all the more so in rural areas, and remittance-financed productive investments can lead to an increase in the household demand for child work. Child work and schooling are not mutually exclusive, but are, nevertheless, conflicting activities (Ravallion and Wodon, 2001), so that an increase in the household demand for child work could have a detrimental impact on school attendance.

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[74] Pritchett (2001) questions, on empirical grounds, the compelling theoretical argument that a larger endowment of human capital is conducive to a more robust rate of economic growth.

[75] If the former is the case, then the receipt of remittances delays the entrance of young cohorts to the domestic labour market, as they raise the enrollment rates in higher-education institutions; in the medium run, this would improve the skill-composition of the labour force. If, on the other hand, the prospect to migrate reduces the incentives to invest in education, remittances could be used to finance the migration cost for an additional household member.

1.5 Social remittances

The transmission of ideas from migrant countries of destination can modify some behaviors – such as the female participation to the labour market, which is discussed in section 2.4 – which, in turn, have an impact on fertility choices (Fargues, 2007a; Fargues, 2007b; Beine et al., 2009). This transmission of demographic norms from the countries of destination to the countries of origin has a delayed impact on the labour market, as it influences the size of the cohorts which enter the labour market 20 years later. This entails that the past migration record of a country influences the current demographic pressure on the labour market.

2. Behavior in the labour market

Section 1 has analyzed the impact that migration exerts on a country's endowment of labour either directly or indirectly through the influence it can produce on the incentives to invest in education. Still, migration can also influence the behavior of working-age individuals on the domestic labour market. Migration influences both the ability to take up a job offer – through the reshaping of family structures that it induces, and the willingness to do so – through the income effect brought about by migration and remittances. Even social remittances can significantly influence behavior on the labour market, as destination countries often differ in features such as the rate of female participation.

2.1 Actual migration

The migration of a family member can have a relevant impact on family structures. If the member who migrates leaves some children behind, then this can lead to a significant reshaping of family structures. His – or, less likely, her – spouse can go back to their parents' house, in order to have someone who can help them in taking care of the children left behind. Bryant (2005) observes that "children of migrants are more likely to have relatives from outside the nuclear family living in the same household, especially if both parents are overseas". This entails that migration could *per se* foster female participation in the labour market, as women can more easily rely on relatives to take care of their children.

2.3 Prospect to migrate

The prospect to migrate can have an impact on the participation rate or on the reserve wage of domestic workers (Fan and Stark, 2007a). The latter effect can be channeled through the cultural influence that destination countries exert, as people adjust their perception with respect to what represents a fair wage. Would-be migrants adopt a *wait and see* strategy, devoting their efforts to prepare their migration project, and turning down low-paid job offers. If the prospect to migrate induces some individuals to give up any attempt to actively look for a job – so that they are no longer recorded as being unemployed – then this could further reduce the unemployment rate, though it is doubtful, to say the least, that the country would gain from this further reduction.

2.3 Remittances

Remittances can reduce the work effort of the members of recipient households (see the recent empirical contribution by Cox Edwards and Rodriguez-Oreggia, 2009). This can come about with the positive income effect brought about by remittances, although one should be aware of not taking remittances at their face value. Remittances are not just added to other household income sources. Rather they have to replace the lost domestic income of the migrant, who is often the main *bread-winner* in the household. As Acosta et al. (2006) observe, "migration also entails potential losses of income, associated with the migrants' absence from their families".[76] This point means that the income effect of remittances differs from the face value of the transfer, but still it could lead to a reduction in the participation rates of members in recipient households, possibly through an increase in their reservation wages.

A more subtle argument refers to the *moral hazard* problem that remittances can give rise to (Chami et al., 2005): the transfer of remittances is – at least partly – motivated by altruistic reasons (see Rapoport and Docquier, 2006 and Bouhga-Hagbe, 2006 for evidence for selected Middle East countries) and this entails that the migrant tends to adjust the level of the transfer in the face of an adverse income shock that may hit their relatives in the home country. Recipients can then exploit this altruistic behavior: they can reduce the unobservable work effort that they exert, bringing about a decline in their labour earnings which will then be compensated for by the migrant though higher remittances.

Remittances can also influence the labour market participation of children and teenagers, as discussed in section 1.4.1, if they foster the development of family-run activities.

2.4 Social remittances

The transmission of ideas and social norms from migrant countries of destination can have a substantial impact on some deeply-rooted behavior, such as female participation in the labour market (see above). Clearly, such an effect is closely related to how migration reshapes the family structure in migrant-sending households, as discussed in Section 2.1.

Demand side of the labour market

3. Consumption patterns

Migration can profoundly reshape the consumption patterns that prevail in migrant-sending countries, and this influences the sectoral composition of labour demand. Migration stimulates the demand for services – such as communication and financial services – that are needed to keep strong ties with migrant communities abroad. The uneven sectoral impact of migration is reinforced by the likely inflationary effects of remittances that tend to channel resources and labour towards the non-.traded sector. This includes the building sector, and a boom in real estate – not necessarily limited to migrant-sending areas – is a common experience of countries that undergo intense migration waves. Needless to say, consumption patterns are highly exposed to the cultural influence of the habits that prevail in destination countries, and the returnees can be a channel of transmission for such an influence.

3.1 Actual migration

Actual migration modifies the patterns of consumption in migrant households, as it increases the demand for non-traded services: financial services, communication facilities, and tourist facilities. In migrant-sending areas, where the share of households having at least one member abroad is higher, money transfer services, phone centers and internet services usually experience a boom, and this increases the demand for labour in these sectors. Clearly, the relevance of these effects depends on several confounding factors, such as the size of the migrant population and the strength of the ties with the diaspora.

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76 Moreover, it must not be forgotten that migration is a risky venture that can also have a negative income effect for migrant households; this would occur if the migrants fail to find a job in the country of destination, or if they voluntarily decide to break up the family ties and not to send back remittances.

Bougha-Hagbe (2004) and Collyer (2004) argue that real-estate investments are the most common investments among migrants, and that they are not limited to areas of origin, but that they mostly occur in areas of the country that offer some attractions for the summer holidays. The relevance of migrant-led development in the tourism sector depends on several factors: the size of the migrant community, the legal status of the migrants, the geographical proximity of destination countries to the country of origin. When the cost of the travel is affordable and the majority of migrants are free to temporarily leave their host country as they have a legal residence permit, then the development of a tourism sector is more likely to occur.

Actual migration also increases the demand for the export of those goods – such as food – which are sold in so-called *ethnic shops* in destination countries. This occurs if the demand from the diaspora is large enough when compared to internal demand, thus this effect could be relevant for small countries with a large expatriate rate.

The effects of migration on the sectoral demand for labour are strictly interrelated to the effects that remittances produce on the consumption pattern of recipient households (see section 3.3).

3.2 Return migrants

Return migrants can be a relevant channel through which consumption patterns are modified, as they bring home consumption styles they have become familiar with in destination countries. They also bring home the financial resources to purchase the goods and services that they aspire to. This effect is relevant if there is a large number of migrants who return home in the early phases of their adulthood, as young individuals are more exposed to the influence of newly-imported consumption patterns. Imported goods are likely to be overrepresented in the consumption baskets of the returnees, thus reducing the domestic demand for labour.

3.3 Remittances

Remittances can exert an unbalanced effect on the demand for various goods and services, and some sectoral booms – such as in the building sector (Adams, 1991) – can emerge. The development of a particular sector and the ensuing creation of job opportunities can occur only if remittances increase the demand for domestic goods. Conversely, "if remittances increase the import of foreign goods, this will not stimulate the local economy and a very limited multiplier effect will take place [...] a typical example is remittances sent to rural areas where they will be mainly invested in farm production, but also manufacturing and services activities, therefore benefiting the whole economy" (Stalker, 2000).

When remittances leads to an appreciation in the real exchange rate (Amuedo-Dorantes and Pozo, 2004), this affects the sectoral composition of production, with resources being shifted from traded to non-traded sectors, a situation that resembles the so-called *Dutch disease*. While this strengthens the uneven sectoral impact of remittances, the appreciation of the real exchange rate that they brought about also increases the likelihood that their stimulus to private demand leaks out towards imported goods, dissipating the job creation effect.[77]

It is interesting to observe that the eventual job-creation effect determined by migrant remittances can be unevenly distributed across genders; Vargas-Lundius (2004) argues that the receipt of remittances in origin communities stimulates the creation of jobs – such as in the construction sector – where men represent a disproportionate share of the workers, so that they can contribute to reinforcing existing gender inequalities in labour-market outcomes such as wage and unemployment rates (see also section 1.1 on this).

77 Da Cruz (2004) argues that in the small countries, which are heavily reliant on remittances – such as in the Comoros, his own case study, remittances contribute to a boom in imports, thus worsening the trade balance.

3.4 Social remittances

Consumption patterns can be influenced directly by the transfer of norms and ideas from destination countries. Non migrants are often receptive to the consumption patterns and the behaviours that the migrants bring back home. The demand for particular kinds of goods and the ensuing development of particular sectors of the economy can be influenced by these inflows of ideas from abroad. Social remittance are particularly important "when migrants return to live or visit their communities of origin; when non-migrants visit those in the receiving country; or through exchanges of letters, videos, cassettes, e-mails, and telephone calls" (Levitt, 1998). Again, this effect is relevant in those countries (or regions) where the expatriate rate is high.

4. Investments and entrepreneurial models

The demand side of the labour market is not only exposed to effects that arise through changes in private consumption, but also to the influence that migration exerts on the choice of entrepreneurial models, and on the ability to finance ensuing investments. Remittances, the most apparent counterpart of labour migration, clearly represent the source of these funds, which have an outreach that goes far beyond recipient households. There are also high expectations for the migrants themselves, who are supposed to acquire additional skills in the countries of destination, and hence to have a higher likelihood for setting up a new enterprise upon their return. Once more, return migrants can be the vehicle for the introduction of entrepreneurial models from the countries of destination to the countries of origin, but social remittances can also be transferred through broader and less concrete channels.

4.1 Remittances

Remittances can stimulate productive investments (Orozco, 2000; Woodruff and Zenteno, 2007), ease the provision of credit and the development of financial and equity markets (Giuliano and Ruiz-Arranz, 2009; Billmeier and Massa, 2009), although these positive developmental contributions are not independent of the economic and institutional frameworks of recipient countries.[78]

Remittances also exert an important insurance role for recipient households; the risk-differentiation brought about by migration at the micro level can offer the chance to undertake productive investments that are profitable but that would have otherwise been deemed as too risky (Rapoport and Docquier, 2006). Adams (1991) analyzes the expenditure patterns of returned migrant households, finding that they devote a large share of their remittance incomes to investment rather than to consumption, as they perceive remittances as being a temporary rather than a permanent source of income. Similar findings are reported in Adams (2006a), where the author shows that households receiving remittances spend less on consumption and more on investments, education and housing than non-receiving households. He also stresses the importance of the effects of remittances on wages and employment in areas where they are spent productively.

Giuliano and Ruiz-Arranz (2009) use data from approximately one hundred developing countries over the period 1975-2002 and they show that remittances provide an alternative way to finance investment in countries with poor financial systems. Remittances can help to overcome liquidity constraints in countries where credit markets are inefficient or non-existent. Aggarwal *et al*. (2006) use a sample of 99 countries and they argue that remittances promote stock market development, and Gupta *et al*. (2007) reach the same conclusion for Sub-Saharan Africa. Needless to say, these effects can give rise to a significant indirect impact on the labour market through the ensuing job-creation effect.

78 Remittances also reduce the likelihood of a Balance of Payment crisis (Bugamelli and Paternó, 2006), which induces a major fluctuation in the business cycle, and hence in the level of investments and labour demand.

Remittances can also be channeled through migrant associations – the so-called *home town associations* – formed by migrants living in the same country, and coming from the same area, who put together their savings to invest them in projects to promote the economic and social development of their origin community. Collective remittances are usually used for the construction of hospital, schools and other social investments, and they can thus stimulate the demand for workers in the building sector, with positive ensuing spillover effects (Guarnizo and Smith, 1998).

4.2 Return migrants

Returnees can bring back home new skills they have acquired in destination countries. Moreover, thanks to the savings they have accumulated abroad, they can also afford to undertake costly investments. They may also be better placed to become entrepreneurs, and to adopt new models of entrepreneurial activities, which they have experienced in destination countries.

The hypothesis that return migration increases the probability of opting for entrepreneurial activity has been recently tested, comparing returnees with stayers. Kilic *et al*. (2007) find that returnees to Albania are, *ceteris paribus*, more likely than stayers to become entrepreneurs. Wahba and Zenou (2008) conversely find that Egyptian returnees have a lower propensity to set up an entrepreneurial activity, notwithstanding the experiences and the savings they have accumulated abroad, as migration also produces a loss of social capital that represents a key factor in establishing an enterprise which operates in an informal setting. Most existing empirical studies pool together self-employed and employers as being entrepreneurs, while the ensuing job creation effect is clearly different.

Returnees' skills and savings can bring a substantial contribution to the development of medium and small enterprises: MSEs in developing countries are extremely vulnerable, and the establishment of a new entrepreneurial activity may be of little significance if it does not last. Returnees may be better able to overcome the difficulties faced by MSEs, as they can draw on their foreign savings not only to finance the initial capital investment, but also to reduce the vulnerability of their enterprises in the face of adverse demand shocks. If this is the case, then the job creation effect due to return migration would induce a lasting increase in the demand for labour.

4.3 Social remittances

The transfer of new forms of entrepreneurial models is not limited to return migrants alone, but it can also occur through the increased tightness of communication with the countries of destination. Social remittances not only permit migrant households to improve their knowledge of available technologies and entrepreneurial models, but there is also a "multiplier" effect due to communication among non-migrant households. A specific kind of social remittances is represented by the technological transfer brought about by networks of skilled migrants (Docquier and Lodigiani, 2007).

Part II - Empirical evidence

After an introductory section on the salient features of migration out of the Arab Mediterranean Countries, the structure of this part of the paper mirrors the first part, where we presented the theoretical arguments about the impact of migration on labour market outcomes in origin countries. But its content does not, as the empirical evidence lags seriously behind the theory because of the remarkable analytical challenges that this evidence poses, and because of binding data limitations. Wherever possible, we nevertheless try to offer an – albeit limited and tentative – assessment of the relevance of the theoretical arguments for AMCs. It is important though to flag up an important *caveat* here. This paper does not provide new empirical evidence. Rather it systematizes the existing and dispersed evidence according to the structure laid out in the previous section. While important knowledge gaps remain, the systematization of the existing empirical evidence will hopefully reduce the number of the gaps that a reader might have initially feared.

5. Salient features of migration out of the Arab Mediterranean Countries

This section is meant to briefly outline the salient features of migration from Arab Mediterranean Countries that are relevant in shaping migration impact on domestic labour markets. Such an effort is riddled with substantial difficulties, as the most widely-quoted figures on emigrants are immigration-based (Dumont and Lemaitre, 2005; Docquier and Marfouk, 2005), i.e. obtained through the aggregation of data gathered in the destination countries. Such an approach can give rise to substantial discrepancies with emigration-based statistics,[79] which – in the case of Egypt - can even be 246 percent higher than data gathered in the countries of destination (Fargues, 2007c). This problem can also be traced back to the fact that one of the main destinations for migrants from AMCs – and specifically for those from the Mashreq – are the Gulf Countries, which provide only limited statistics on immigration. This entails that data gathered from the OECD countries alone provide only a partial representation of the migration out of AMCs. Moreover, intra-regional migration is also substantial – and not particularly selective in terms of migrant skills (World Bank, 2008a). Though this may fall outside the scope of this paper – as this need not be replacement migration[80] – intra-regional migration represents a further important *caveat* against taking migration statistics about AMCs at face value.

Fargues (2007c) estimates the number of first generation migrants from the Arab Mediterranean Region at 12-15 million. Migration from the area is on the rise – particularly from Morocco, Lebanon, Egypt and Algeria – and it will continue in the next decades because of the persistence of both push and pull factors.[81] Table 5.1 reports the figures about the stocks of emigrants from six AMCs based on data from origin countries, and provides information about the magnitude of cumulative flows, as well as about the geographical distribution of migrants.

79 "The main reasons for the observed discrepancies can be summarized by artificially generated data, different sources of information in terms of year and the country that the migrants are counted at, the ambiguity of how refugees and transit migrants are dealt" (Isaoglu, 2007).

80 This can be traced back to the segmented nature of the labour markets in the AMCs; Corm (2009) shows that Jordan records substantial flows of highly educated migrants towards the Gulf Countries, and relevant inflows of low-skilled immigrants – mostly from Syria and Egypt – who tend to take up low-paid jobs in the Jordanian labour market. In Jordan, in the 1980s, a large number of workers from Egypt and Syria was attracted by the availability of jobs in the agriculture and construction sectors: although this was portrayed as replacement migration, it was actually an immigration which "responded to the upscale mobility of non expatriated Jordanians". A segmented labour market was created: these sectors until that moment had always been dominated by foreign nationals, who receive very low wages and do not have legal protection (Chatelard, 2004; De Bel Air, 2008).

81 For a short review of the determinants of migration from AMCs and predictions for the next decades, see Mediterranean Report (2007).

Table 5.1. Stock of emigrants from AMCs, last available years

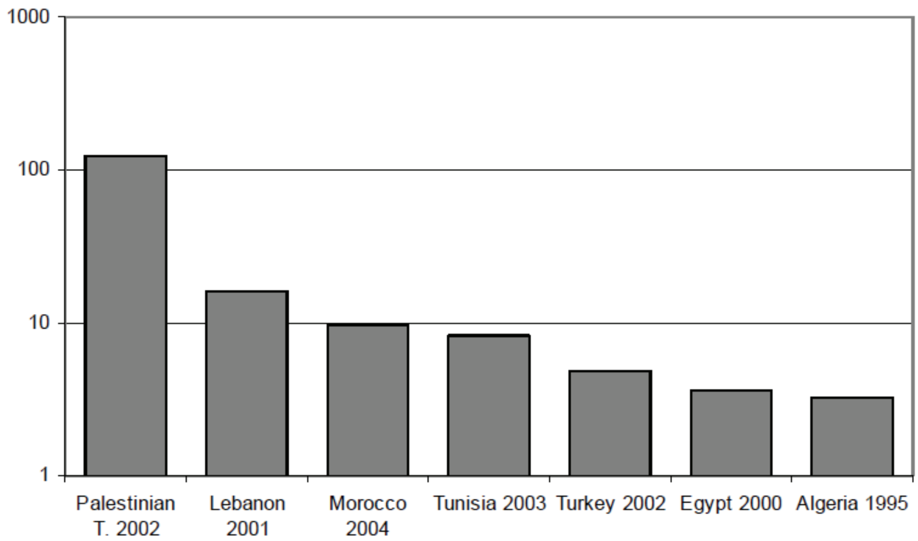
		Country of residence			
Country of origin	***Year***	***European Countries***	***Arab Countries***	***Other Countries***	***Total***
Algeria	*1995*	*991,796*	*66,398*	*14,052*	***1,072,246***
Egypt	*2000*	*436,000*	*1,912,729*	*388,000*	***2,736,729***
Jordan	*2004*	*n.a..*	*n.a.*	*n.a.*	***29,397***
Lebanon	*2001*	*157,030*	*123,966*	*325,604*	***606,600***
Morocco	*2005*	*2,718,711*	*213,034*	*253,641*	***3,185,386***
Palestine	*2002*	*295,075*	*4,180,673*	*231,723*	***4,707,471***
Syria	-	-	-	-	**-**
Tunisia	*2005*	*779,200*	*128,900*	*25,800*	***3,520,000***

Notes: Syria does not provide statistics for its nationals abroad; "Europe" to read in the case of Palestinians abroad as "all countries except the Arab countries and the US"**.**

Source: CARIM (2007)

Figure 5.1 builds on the previous table, and gives the share of migrants over resident population; though the incidence of emigration out of the Palestinian Territories is unmatched by any other AMCs. This is high even in other countries such as Lebanon, Morocco and Tunisia, where it is close to 10 percent of the resident population.

Figure 5.1. Share of emigrants from AMCs, last available years



Source: Fargues (2005)

Corm (2009) presents figures on aggregate migration from AMCs and other MENA countries for the first years of this century which are based on Dumont and Lemaître (2005) for OECD countries, and on Baldwin-Edwards (2005) for the Gulf countries, which are reported in Table 5.2.

Table 5.2. Migrants by region of destination as a percentage of resident population in the origin country, 2000-2002

	Country of residence			
Country of origin	***North America and Australia***	***Main European Countries***	***Gulf and other Arab countries***	***Total***
Algeria	***0.11***	***4.32***	***0.22***	***4.64***
Egypt	***0.27***	***0.21***	***2.77***	***3.25***
Jordan	***1.11***	***0.25***	***9.26***	***10.62***
Lebanon	***7.10***	***2.80***	***3.50***	***13.40***
Morocco	***0.23***	***5.18***	***0.96***	***6.37***
Palestine	***0.24***	***0.21***	***-***	***0.45***
Syria	***-***	***-***	***-***	***-***
Tunisia	***0.13***	***4.46***	***1.11***	***5.71***

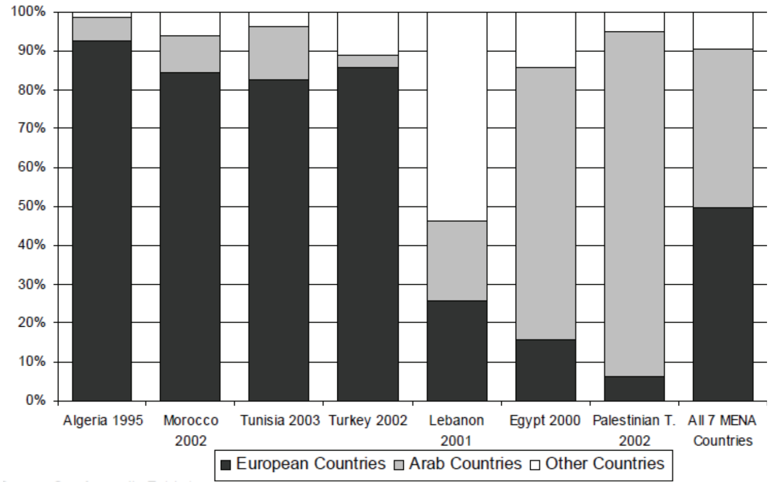
Note: the figure for Jordanians in the Gulf and other Arab countries includes Palestinians.

Source: Corm (2009)

This table – which is based on destination-countries figures – demonstrates that the percentage of migrants over resident population in all Arab-Mediterranean countries, except for Palestine, is higher than the world average of 2.9 percent. At the same time, the levels of total migration out of these countries are low when compared to other regions in the developing world such as Latin America. Migrants from the Maghreb amount to 5.5 percent of the population, while migrants from the Mashreq are about 3.3 percent of the population. Egypt is the largest labour exporter among AMCs – in absolute terms, as World Bank (2008a) claims that 10 percent of the Egyptian labour force is employed in other AMCs and Arab countries alone.[82]

82 World Bank (2008) shows that skilled Egyptian migrants mostly go towards the Gulf Countries and Libya, while unskilled migrants tend to go to Iraq, Jordan, and Lebanon; CAPMAS (2004) estimates that 2.7 million Egyptians are abroad, 1.9 million in other Arab countries and 0.8 millions in OECD, in particular in the US, Canada and Australia.

Figure 5.2. Share of emigrants from AMCs by area of destination, last available years



Source: Fargues (2005)

Figure 5.2, which is reproduced from Fargues (2005), provides the break-down of migration figures according to migrant destination country, showing a sharp difference between Maghreb and the Mashreq countries. Both figure 5.2 and table 5.2 demonstrate that the distribution of migrants across areas of destination is changing. Migrants from the Maghreb move predominantly towards European OECD countries, while approximately two thirds of the migrants from the Mashreq reside in the Gulf and in other Arab countries.

Cross-country differences in terms of migrant distribution are also related to the predominant pattern of migration: while migrants towards the Gulf Countries tend to move on a temporary basis, migration towards the OECD is mostly on a permanent basis (World Bank, 2008a). Table 5.3 reports information on the length of individual migration episodes to selected OECD countries.

Table 5.3. Distribution of migrants to selected OECD countries by duration of stay

Country of origin	*Less than 1 year*	*1-3 years*	*3-5 years*	*5-10 years*	*10-20 years*	*More than 20 years*	*No answer*
Algeria	*1.1*	*1.8*	*1.8*	*4.9*	*7.1*	*61.5*	*21.8*
Egypt	*3.9*	*6.5*	*6.7*	*13.0*	*22.2*	*39.6*	*8.1*
Jordan	*4.7*	*7.5*	*7.3*	*16.9*	*29.3*	*32.3*	*2.0*
Lebanon	*2.7*	*4.1*	*3.7*	*14.4*	*33.9*	*37.1*	*4.1*
Morocco	*3.4*	*7.2*	*5.8*	*11.4*	*19.9*	*39.4*	*12.8*
Palestine	*4.8*	*7.6*	*5.4*	*15.0*	*25.2*	*37.2*	*4.8*
Syria	*3.2*	*6.4*	*5.7*	*16.6*	*34.5*	*29.6*	*4.0*
Tunisia	*1.4*	*2.3*	*1.9*	*5.0*	*12.8*	*53.4*	*23.3*

Note: data refer to: Australia, Canada, Italy, France, Spain, Sweden, United States.

Source: Dumont (2006)

These differences in geographical distribution and in the length of the individual migration episodes have far-reaching consequences for the labour market, as has been briefly argued in Section 1, for the characteristics of the labour markets at destination are a relevant mediating factor in shaping the impact of migration upon the countries of origin. This also means that the empirical relevance of the various potential channels of impact which have been highlighted in the previous sections are likely to differ across the Maghred-Mashreq divide. Still, Fargues (2007c) argues that there are a number of exceptions to this "rule": for example, there are more temporary Egyptian migrants in Italy, and more permanent migrants in the Arab Peninsula. The main difference between the destinations is not in the length of stay, but in the legislation on citizenship issues, which is very restrictive in the Gulf countries. Table 5.4 shows that the majority of regular immigrants in OECD countries have acquired the citizenship of the host countries. Needless to say, this can have far-reaching consequences upon the labour markets of origin countries, as it influences the likelihood of a return, as well as remitting behaviour.

Table 5.4. Distribution of migrants to selected OECD countries by citizenship status (percentages)

Country of origin	National	Foreigner
Algeria	*65.0*	*35.0*
Egypt	*66.9*	*33.1*
Jordan	*63.3*	*36.7*
Lebanon	*79.5*	*20.5*
Morocco	*37.9*	*62.1*
Palestine	*77.2*	*22.8*
Syria	*67.8*	*32.2*
Tunisia	*61.0*	*39.0*

Note: data refer to: Australia, Canada, Italy, France, Spain, Sweden, United States.

Source: Dumont (2006)

Migrants from AMCs are predominantly male, although migration flows from Maghreb countries have recorded increasing numbers of women and children (Schramm, 2009), as the demand for jobs traditionally performed by women is on the rise in OECD countries, and because of family reunification provisions.[83]

Supply side of the labour market

6. Labour force - endowments

6.1 Actual migration and labour force

Actual migration can alleviate the pressure on the labour market provided that the rate of emigration is high enough compared to other demographic factors. This occurs in the small countries of the Mashreq: Jordan, Lebanon and Palestine, where the number of nationals abroad as a share of the origin country population is very high, a fact recalled in Section 5.

83 Evans and Papps (1999), quoted in Al Ali (2004), argue that about one third of Arab migrants abroad are living with their families, while this is certainly not the case for the majority of the migrants moving towards the Gulf, where permanent migration is not allowed, so there are limited provisions for the reunification of migrant families.

Jordan gives a telling case study in the labour market impact of migration flows, as – according to Chatelard (2004) – Jordanian economic development is closely intertwined with the prevailing dynamics of international labour mobility. This was particularly true in the 1980s, when an estimated 42 percent of the labour force was expatriated, and such a massive outflow led to a substantial decline in unemployment. When, in the early 1990s, a large number of Jordanians were repatriated because of the Gulf War, the country experienced a 10 percent increase in its population, causing heavy pressure on infrastructure, public services and housing, and the unemployment rate climbed as high as 30 percent (De Bel Air, 2008).

By the same token, international migration has always been an essential route of escape for excess labour supply among Palestinians: restrictions on entry to the Israeli labour market after the beginning of the second *Intifada* created a sharp rise in unemployment, which increased from 13 to 29 percent between 1999 and 2006 (Hilal, 2007).

As far as the large countries of the Arab Mediterranean area are concerned, Ramamurthy (2003) finds that Egypt is the only one in his sample where emigration has had a significant effect on employment. Nassar (2005) argues that – notwithstanding data limitations and despite the fact that the best workers, and not the unemployed, are those who migrate – the direct impact of migration on the Egyptian labour market can be gauged from events during the Gulf crisis, when Iraq and Kuwait closed their borders, and many Egyptians were repatriated.[84]

The effects of migration on labour markets need not be confined to the areas of origin of the migrants, as international migration is strictly linked to the internal movement of peoples: it often induces the internal relocation of labour forces. For instance, de Haas (2007) shows how migrant sending areas in Morocco became destinations for many internal migrants from other villages or from poorer regions; Berriane (1996) and El Meskine (1993), quoted in de Haas (2007), observes that many construction and agricultural workers in the Rif area come from the Tafilalt and Draa valley in Southern Morocco.

The figures about the aggregate size of migration – both in terms of flows and stocks – out of AMCs needs to be handled with caution as the most widely-used datasets – such as Docquier and Marfouk (2005) – are based on immigration statistics that do not cover the Gulf countries, as recalled in Section 5. With this *caveat* in mind, Table 6.1 reveals that past and current migration patterns have an uneven impact on the main educational groups, as better-educated migrants are overrepresented in the migrant population. While the emigrant population of these eight countries is characterized by a varying skill profile,[85] as the data columns on selection rates show, the rate of emigration from each of these countries is increasing in skill level. Lebanon, Morocco[86] and – to a lesser extent – Tunisia are characterized by a rate of emigration among tertiary-educated individuals which might raise some concerns concerning a sizeable *brain drain*, that could push up the skill premium in the labour–earnings distribution (see also section 1.2 on this). Indeed, Adams (2003) argues that Morocco and Tunisia suffer from a drain of their talented workers, though it is fair to say that the *drain* of skilled workers does not rank high among the factors that hinder the economic development in the AMCs countries – particularly in the larger Maghreb countries – as it is limited in size when compared to other developing regions, such as Sub-Saharan Africa (Ozden, 2006).

84 Similarly, Nassar (2008) argues that there have been clear benefits from emigration in terms of unemployment reduction in the 1980s, when Gulf countries attracted a large part of the Egyptian excess labour supply.

85 The disproportionately high share of low-skilled individuals in the migrant population of the Maghreb countries – Algeria, Morocco and Tunisia – can be traced back to the existance of well-established migration networks with the countries of destination, which, as the recent paper by Beine et al. (2008a) shows, are associated with a reduction in the selection rate of the migrant population.

86 In Morocco – together with Egypt and Jordan – the rate of return to education remains low (World Bank, 2008), notwithstaning the reported migration rate of tertiary-educated workers which could have pushed up skilled wages.

Table 6.1 Rates of emigration and selection rates of migrants from AMCs, year 2000

	Rate of emigration				*Selection rate*			
	Low	*Medium*	*High*	*Total*	*Low*	*Medium*	*High*	*Total*
Algeria	*4.6*	*2.1*	*9.4*	*4.5*	*76.7*	*9.2*	*14.1*	*100.0*
Egypt	*0.2*	*0.8*	*4.6*	*0.9*	*18.3*	*22.9*	*58.9*	*100.0*
Jordan	*1.0*	*2.4*	*7.2*	*2.8*	*16.4*	*28.0*	*55.6*	*100.0*
Lebanon	*9.4*	*11.1*	*38.6*	*15.0*	*30.4*	*25.1*	*44.5*	*100.0*
Morocco	*6.8*	*8.1*	*17.0*	*7.6*	*70.6*	*16.5*	*12.9*	*100.0*
Palestine	*1.0*	*2.5*	*7.2*	*2.9*	*15.8*	*29.1*	*55.0*	*100.0*
Syria	*0.9*	*2.3*	*6.1*	*1.9*	*31.0*	*24.7*	*44.3*	*100.0*
Tunisia	*5.1*	*3.8*	*12.5*	*5.4*	*73.0*	*12.1*	*14.9*	*100.0*

Source: Docquier and Marfouk (2005)

Table 6.2 provides data on the rate of emigration for low- and highly-educated individuals from a recently released update of the dataset by Docquier and Marfouk (2005), which also gathers immigration statistics from the Gulf countries.[87] This table shows that the extent of skilled migration out of AMCs is easily underestimated if data sources are unduly restricted to OECD countries alone: including non-OECD destinations increases the emigration rate among the highly-skilled from 4.6 to 8.4 percent for Egypt, and from 7.2 to 19.0 percent for Palestine. This means that the arguments about the limited extent of the *brain drain* from AMCs which were based on Table 6.1 need to be somewhat mitigated.

Table 6.2 Rates of emigration from AMCs by educational level, year 2000

	Rate of emigration	
	Low	***High***
Algeria	*4.7*	*9.9*
Egypt	*2.7*	*8.4*
Jordan	*8.4*	*11.4*
Lebanon	*11.2*	*45.5*
Morocco	*7.5*	*21.0*
Palestine	*7.7*	*19.4*
Syria	*2.5*	*8.0*
Tunisia	*5.7*	*14.3*

Source: Docquier and Rapoport (2009)

Still, in order to gauge the relevance of the possible concerns around the *brain drain* that could arise from Table 6.2, those figures have to be compared with the high level of unemployment in better educated groups.[88] World Bank (2008a) argued that the unemployment rate in the whole

87 The current version of the paper does not disclose the information on the primary data sources that the authors rely on.

88 See Section 7.2 on the impact of the prospect to migrate on the unemployment level of higher-educated workers.

MENA region would have been higher in a hypothetical scenario without emigration, but unemployment rates remain high, and this has greatly softened the potential positive impact of migration on domestic wages. This suggests that the opportunity cost of the migration of university graduates is low; the majority of skilled migrants who decided to migrate were unemployed or employed in the public sector. This also means that skilled migration does not create a brain drain effect and, probably, that it reduces the public wage bill (World Bank, 2008a). Table 6.1 suggests that Egypt has the highest selection rate among AMCs, and this can be traced back to the high unemployment rate among educated working age individuals. A comparison between Egypt and Morocco shows that there is a positive relationship between education level and the chances of being unemployed in Egypt, while a similar relationship does not exist in Morocco (World Bank, 2008a). Still, Boudarbat (2004) shows that the unemployment rate of Moroccan university graduates was, in 2000, about four times the rate of individuals with less than six years of schooling. Indeed, Sorenson (2004) reports that the Moroccan government depicted migration as a solution to the problem of widespread underemployment and unemployment of the domestic workforce in official documents.

Other features of the migration process can produce more substantial impacts on the labour force, namely its uneven gender profile and the migration of workers out of specific sectors. As far as gender is concerned, migration can lead to a worsening wage gap – and a worsening too of other labour market outcomes, such as participation and unemployment rates – across genders,[89] although such an effect – which is due to the uneven impact of migration on the endowments of male and female labour[90] – can be counteracted by the effects that migration exerts on the behavior on the labor market, possibly reducing female participation (see Section 7.1).

Does migration create relevant shortages of workers in some sectors in AMCs? World Bank (2008a) argues that migration does not create bottlenecks in the domestic market of Middle Eastern and North African countries. Nevertheless, such a general statement should not lead us to overlook specific instances of possible shortages. Doquier and Rapoport (2009) report data on researchers employed in the science and technology sector in the United States: the number of Tunisians working there is 0.17 times the number of researchers working in Tunisia, and the corresponding figure for Algeria is 0.25 times. Khelfaoui (2006), finds that engineers and scientists are the most common professional category of Algerians in the United States, though they may not be employed according to their qualifications.

It is also worthwhile paying a closer look at what happens to health workers. Docquier and Bhargawa (2007) collect data from 16 receiving OECD countries, and they define the total physician emigration rate of a country as the ratio between the stock of national physicians working abroad and the number of physicians trained in the home country, thus excluding those trained in the host country. The figures we present here represent an update of Docquier and Bhargawa (2007) presented by Doquier and Rapoport (2009), where the authors have added South Africa to the destination countries.

We observe in Table 6.3 that the percentage of physicians abroad – as far as a selected group of OECD countries is concerned – is very high only for Lebanon and Syria. Estimates from the Arab-American Medical Association show that there are 15,000 Arab physicians in the United States, and 6,000 of them come from Syria (Kawakibi, 2009). Nevertheless, we have to keep in mind the data limitations, as Achouri and Achour (2002), for example, point out that most Tunisian physicians who migrate go to Saudi Arabia.

89 UNDP (2006) observes that “in Jordan, for example, women university graduates earn 71 per cent of the amount earned by males in the same cohort; this drops to 50 per cent among those who have completed basic education only, while illiterate women earn less than 33 per cent of male wages (Moghadam, 2005)”.

90 The existing gender gap in migration flows out of AMCs could be off set by the steady growth in demand for jobs, such as housework and the care of the elderly, which are usually taken by women in European countries (Al Ali, 2004).

Table 6.3 Emigration rates of physicians trained in their origin country

	Rate of emigration
Algeria	*7.1*
Egypt	*5.6*
Jordan	*9.9*
Lebanon	*19.6*
Morocco	*6.6*
Palestine	*1.5*
Syria	*17.5*
Tunisia	*4.2*

Source: Docquier and Rapoport (2009)

Moreover, if we take into account the physicians born in the AMCs but trained abroad – as Clemens and Patterson (2006) do – the numbers are more worrisome[91]. Their estimates differ dramatically from the previous ones: 44 percent of Algerian physicians, 31 percent of the Moroccans and 33 percent of the Tunisians are practicing abroad by these criteria. Regarding nurses, the numbers are lower: respectively 9, 15 and 5 percent of them work abroad.[92] Notwithstanding these impressive figures, there are some factors that suggest that medical *brain drain* has so far imposed limited direct costs on the Maghrebian countries. Most foreign-employed doctors and nurses have been trained abroad, and their migration is more a symptom of the underlying difficulties of the domestic health-care systems than its cause[93]. Therefore, it would be hard for foreign-employed health-care workers to enter their origin country's labour markets under the current conditions, as a significant increase in the demand for medical personnel seems highly unlikely. Moreover, it is uncertain whether these doctors and nurses would have studied medicine anyway in the absence of a prospect to migrate.

The same could be said about the thousands of students from AMCs who acquire their tertiary education abroad. Student migration from AMCs is an increasingly common phenomenon. It is an instrument OECD countries use to select highly-skilled workers, as students tend to be probationary migrants. About 7 percent of the foreign students in OECD currently come from the Arab countries, in particular from Morocco. Table 6.4 shows the number of foreign students enrolled in tertiary education by country of origin. According to Dumont (2006), it is difficult for the origin country to benefit from this kind of migration: to do so they should maintain links with the students and offer them incentives to return home to work.

91 Not only the country where physicians have been trained, but also the definition of who is a migrant matters: in the countries of destination, such as France, where there are a lot of second- and third-generation migrants, and most of them have double citizenship, it is not easy to determine who is a migrant.

92 They count all the doctors and nurses employed in the main nine destination countries: the UK, Spain, France, the US, Australia, Canada, Portugal, Belgium and South Africa.

93 In Morocco, the health-care system suffers from underutilization of services: hospital beds capacity, for example, despite being low, has a 56 percent average occupancy rate (WHO, 2006b). Although the WHO claims that more than 200 facilities are closed due to a lack of human resources, the main problem appears to be the lack of efficient planning, as they signal the lack of specific categories of specialists. Even the Tunisian health-care system experiences a deficiency in some kind of specialists (Achouri and Achour, 2002). In Algeria, public services have suffered from the reduction of public funds devoted to the welfare system since the mid 1980s, due to the economic and political crisis and the ensuing structural adjustment (Chemingui, 2003).

Table 6.4 Number of students from AMCs enrolled in tertiary education in 2003 in 26 OECD countries

	Rate of emigration
Algeria	*2,028*
Egypt	*5,875*
Jordan	*5,261*
Lebanon	*9,318*
Morocco	*53,631*
Palestine	*929*
Syria	*4,908*
Tunisia	*12,259*

Source: Dumont (2006)

6.2 Prospect to migrate and labour force

While there is limited direct evidence with respect to the impact of the prospect to migrate on human capital formation in AMCs, some indirect evidence can be gained by observing the pattern of migration by skill levels. The theoretical arguments depicted in section 1.2. reveal that a necessary condition for the occurrence of a beneficial brain drain is represented by an increase in the expected return to education once migration prospects open up, and this means that better-educated individuals have either a higher incentive to migrate because of prevailing wage distribution at destination, or a better ability to do so, because of skill-selective immigration policies. Table 6.1 provided a first snapshot of emigration, broken down by skill levels, out of AMCs in the year 2000. This adverse static effect could be offset by the contribution that the prospect to migrate provides by way of human capital formation in these countries.[94]

Still, what we observe in Table 6.1 need not be driven by a higher incentive or better ability to migrate – because of the pattern of out-selection determined by immigration policies – for better educated individuals, as the skill premium in wage distribution tends to fall with higher levels of income (see Figure 1.1). Mattoo et al. (2008) provide evidence of so-called brain waste in the US labour market from a survey which also provides data on Egyptian immigrants.[95] The possibility that the emigration rates across educational groups reported in Table 6.1 are influenced by the adoption of skill-selective immigration policies seems uncertain as well, as migrants to OECD countries from the Maghreb countries – such as Morocco and Tunisia – tend to move to Europe (see figures from Ratha and Shaw, 2007). Although things may change with the eventual introduction of the European Blue Card, EU member countries have not so far been the most active contenders in the global contest to attract "the best and the brightest", where traditional immigration countries such as Australia, Canada, New Zealand and – to a lesser extent – the United States have prevailed, with the adoption of tight skill-selective immigration policies. Migration to Europe occurs mostly through family reunification provisions or through irregular routes, which do not induce a skill-selective pattern of migration. Clearly, this need not apply to the countries of the Mashreq – such as Egypt and Lebanon – whose migrants tend to move predominantly towards the Gulf countries and the United States, as these countries are characterized by higher wage dispersion

94 Fargues (2008b) states that migrants from AMCs "may also have an increasing propensity to invest in their own education and to accumulate human capital in addition to financial capital".

95 Mattoo et al. (2008) shows that workers from the MENA region are more likely to obtain a qualified job if they hold a professional degree; the probability of obtaining a qualified job with a master degree is only 49 percent for an Egyptian migrant, compared to 80 percent for an Indian.

across skill levels than as the case with most OECD member countries. Egyptian and Lebanese would-be migrants can be induced to invest more in higher education by the prospect to migrate, and also to adjust the profile of their education to better match labour demand in the countries of destination.[96]

Nassar (2005) observes that half of Egyptian temporary migrants reside in Saudi Arabia, while Libya, Jordan, Kuwait and Iraq host the rest of the temporary migrant population, which, according to OIM (2003), represents the prevailing pattern of Egyptian migration.[97] Temporary migrants are, on average, better educated than those who remain in the home country, and the composition of the migration flows has changed producing a larger share of scientists and technicians since 1985, who currently represent about 40 percent of the total. For instance, 69.1 percent of Egyptian migrants to Yemen are technicians or scientists, while the corresponding figure for the main destination, e.g. Saudi Arabia, stands at 40.5 percent (Nassar, 2005). As Section 5 demonstrated, the temporary character of migration from AMCs to the Gulf is due to the fact that destination countries do not grant citizenship to immigrants, whose length of stay at destination can actually be long enough to support the argument that individual educational decisions in the home country are sensitive to the prospect to migrate.

As far as Jordan is concerned, Chatelard (2004) observes that there is still much demand for highly-skilled workers in the Gulf, while adequate employment prospects at home are limited for young graduates, as De Bel Air (2008) argues. This means that we can safely assume that migration is a way to improve on these low expectations, and to drive up educational investments, which will otherwise be wasted because of the domestic labour market conditions. A similar argument can be advanced too in the case of Lebanon: the number of young, qualified individuals who wish to get a foreign job has increased, as – after the 2006 war with Israel – "insecurity pushes towards the brain drain" (Hourani and Sensening-Dabbous, 2007), and 35 percent of managerial positions in international enterprises located in the Gulf countries are taken up by Lebanese workers (Kasparian, 2008).[98]

These arguments suggest that the common pattern of emigration rates across educational groups that we observe for AMCs could be driven by different factors: while for Mashreq countries the higher emigration rate for higher-educated individuals may suggest that the conditions for a beneficial brain drain[99] are in place, this is not the case for the Maghreb countries, where the pattern observed in Table 6.1 is likely to be due to the correlation between education and income. Individuals with a better level of education self-select themselves as migrants because they are better able to afford migration costs, but this does not lead to any beneficial brain drain dynamics. Still, even as far as Mashreq countries are concerned, we need to remind ourselves that the influence of the prospect to migrate on human-capital formation at home is directly related to the length of individual migration episodes.

96 The Egyptian university system has undergone some changes which partly reflect its reaction to the foreign demand for domestic workers; specifically, to avoid the occurrence of substantial leakages of fiscal resources to the countries of destination, it has progressively, albeit indirectly, increased cost-sharing in higher education, though tuition fees still remain a political taboo (Vossensteyn, 2004).

97 Although immigration-based statistics seem to suggest that OECD countries represent the largest cause of brain drain for Egypt (see Table 6.1 and 6.2), it is actually the Gulf countries and Libya which absorb most Egyptian skilled migrants, as IOM (2003) – quoted in Nassar (2005) – points out.

98 A different argument applies to Syrian migrants: the majority of temporary migrants to the Gulf are young professionals (health professionals, engineers, and other qualified workers) who plan to stay for at least five years because this is the time they need to be able to be entitled not to serve in the military, in exchange for a monetary payment out of the savings they accumulated abroad (Kawakibi, 2008).

99 Note that this term refers simply to an increase in the human-capital endowment of the migrant-sending country as a result of the prospect to migrate, but it does not per se mean that this is welfare-improving for the country, as discussed in section 3.2.

We might also observe that both World Bank (2008a) and World Bank (2009) argue that MENA countries should adopt policies aimed at reducing the mismatch between the qualifications offered by their educational system and those demanded by destination countries. Such a policy prescription indirectly suggests that a *beneficial brain drain* is unlikely to occur at present, as it suggests that domestic human capital formation does not respond to the labour markets at destination.

6.3 Return migration and labour force

Return migration is often depicted – as section 1.3 recalled – as one of the main channels through which migration can benefit origin countries. The project on *Return Migration to the Maghreb*, MIREM, conducted at the Robert Schuman Centre showed that almost two thirds of the surveyed return migrants went back to the Maghreb before the age of 50, and 43.2 percent of them before the age of 40, with the prospect of spending a sizeable portion of their working-age life back in the countries of origin. Similarly, the data from the two waves of the Egyptian Labour Force Survey conducted in 1998 and 2006 suggest that even for Egypt a sizeable share of the returnees went back home well before retirement age[100]. This entails that the direct impact of return migration on the labour markets of AMCs can be sizeable, and all the more so if the European Union – which represents the major destination for migrants from the Maghreb countries – decides to push on in its attempt to make most migration out of these countries circular (see Fargues, 2008a and Venturini, 2008).

The impact of return migration can be expected to be positive once migrants deliberately decide to return to their source countries, after having accumulated valuable skills and resources at destination.[101] For instance, in Jordan public and private universities try to actively recruit returnees for academic positions, as their foreign experience gives them skills which attract students. Still, a sizeable part of return migration flows to AMCs are – to use the terminology adopted by the MIREM project – undecided. Major business cycle fluctuations – or political events – in the countries of destination can induce migrants to return back home, and Fergany (2001) recalls the labour-market problems experienced by Egypt and Palestine during the First Gulf War in the early 1990s, when migrants were forced to leave the major host countries – namely Iraq, Jordan, Kuwait and Saudi Arabia. Similarly, Sayre and Olmstead (1999) analyze the negative impact on the Palestinian labour markets of the return of migrants from Iraq and Israel when war broke out in 1991. When return migration is – to say the least – undecided, then the labour markets of the countries of origin face the problem of absorbing this unexpected wave of returnees. The opposite occurs when return migration is deliberately promoted, as in the case of the so called *reverse brain drain* to Palestine which took place after the signature of the Oslo Accords, when an estimated 40,000 to 100,000 Palestinians returned home, mostly from Tunisia and the United States (Sayre and Olmested, 1999). These returnees brought back an enriched set of skills – along with the resources to finance productive investments, see Section 9.2 – and took up positions in the public administration; this in turn gave rise to a latent conflict with other natives, whose chances of employment worsened.

The political relationships among the Arab countries do not represent the unique factor which can give rise to undesirable flows of returnees to the AMCs; these countries are increasingly attracting migrants from Asian countries – most notably, India – which are replacing migrants from AMCs in several sectors (see Girgis, 2002 and Al Ali, 2004). Worsening labour market conditions at

100 In 2006, 70 percent of Egyptian return migrants were younger than 50 years of age (ELMPS, 2006). See section 8.2.

101 Still, it is crucial to observe that returnees self-select themselves among the migrant population, and Hourani and Sensening-Dabbous (2007) argues that this suggests the downplaying of overtly optimistic expectations about the impact of return migration to Lebanon, as “the best and the brightest” among Lebanese migrants decide to remain abroad. This entails that having a predominantly skilled-migrant population is a necessary but not sufficient condition for the countries of origin to benefit from return.

destination represent a powerful push factor for return migration, which could lessen the role of migration in alleviating labour-market pressure in AMCs, and this push factor is most likely to become stronger if the current global economic crisis keeps the international price of oil at a low level.

The case of Syria represents a telling example of how the labour-market effects of return migration depend upon the countries of migrant destination. While Syrian migrants to the Gulf are young professionals (see Section 6.2), most migrants to Lebanon are very low-skilled and cross the border in search of a higher wage which they are able to find only in occupations that Lebanese workers are no longer willing to accept, so that – as Kawakibi (2008) argues – a massive return of Syrians from Lebanon could produce extremely negative effects in the Syrian labour market.

6.4 Remittances and labour force

Migrants' remittances represent one of the most important revenue items in the Balance of Payments of AMCs, so they can produce far-reaching direct effects on the recipient households, and produce relevant macroeconomic effects.[102] Middle East and North Africa is the region which received the highest level of remittances *per capita* over the 1998-2002 period (Straubhaar and Vadean, 2005), while it is the second region – behind South Asia – as far as the share of remittances over GDP is concerned (Maimbo and Ratha, 2005). Remittances amount to 22 percent of GDP in Jordan, 14 percent in Lebanon, 8 percent in Morocco and 5 percent in Egypt (Crom, 2009). Furthermore, Adams (2006b) evidences that remittances to the Middle East and North African countries grew steadily over the 1990-2004 period, and the well-known problems with the reliability of Balance of Payments figures on remittances are unlikely to explain the observed trend.[103]

Although the educational systems in most AMCs impose limited direct costs upon students and their families (Akkari, 2004; Vosseynstein, 2004), indirect costs can be substantial, and the positive income effect due to remittances can help households afford them, thus raising the educational achievement of young members in recipient households. Tables 6.1 and 6.2 show that – as far as the Maghreb countries are concerned – the vast majority of current migrants have a low levels of education, so – as low levels of education tend to be transferred across generations (Galor and Zeira, 1993) – remittances can give an opportunity to break this poverty trap, raising the level of education of young family members over and above the levels of the migrants. Indeed, Table 8.1 below reveals that school fees represent the second or third most relevant use of remittances in recipient households in all the seven AMCs surveyed by EIB (2006). There are a number of studies – such as Berriane (1996), Bencherifa (1996) and de Haas (2003), quoted in de Haas (2007) – which argue that remittances to Morocco contribute to an increase in expenditures in education which benefits young pupils of both sexes.

As van Dalen *et al*. (2005) show, the transfer of migrants' remittances increases the propensity to migrate among Egyptian recipients, and this increases the sensitivity of their educational decisions to foreign rather than to domestic labour-market factors. Still, as the arguments presented in section 1.1 suggests, this need not improve the incentives to invest in education. Remittances can be used to directly finance the migration cost of a young family member rather than to provide him or her with a better education. Such an adverse effect on human capital formation can be increased by observing that parental absence due to migration increases the chances that a child is engaged in an economic

102 The macro-economic role of remittances as a critical source of foreign currency holdings in the Mediterranean countries is emphasized by Escribano (2002). For Morocco, Al Ali (2003) argues that "remittances have become more and more crucial to the equilibrium of the national trade balance. The crucial economic role played by migrants' remittances renders the permanence of Moroccans abroad essential not only for the survival of individual households but also for the viability of the national economy".

103 The current global economic crisis is expected to reverse this trend, with remittances to Middle East and North African countries predicted to fall by a cumulative 6 percent over 2009 and 2010 (Ratha and Mohapatra, 2009).

activity in Egypt (Assad et al., 2007), thus reducing the probability that this child is fruitfully attending school.[104]

6.5 Social remittances and labour force

The contribution by Fargues (2007b) demonstrates that the transfer of ideas that occurs because of migration can substantially influence the labour markets of AMCs through its effect on demographic choices; Fargues' (2007b) idea is that the level of fertility in destination countries influences the level that prevails origin countries. Such an argument means that this effect is uneven across AMC countries because – as section 5 showed – these countries greatly differ in the geographical distribution of their migrants. Migrants from the Maghreb predominantly move towards countries with a low level of fertility – and higher rates of female participation on labour markets, see section 7.4 – while migrants from the Mashreq move towards countries with higher levels of fertility, and more conservative social structures. Thus, while past migration flows are indirectly contributing to alleviate the current pressure on labour markets in Maghreb countries via a reduction in the size of younger cohorts in the population, the opposite occurs in the Mashreq countries. This means that social remittances can either reinforce or dampen the effect of actual migration, as described in section 6.1.

As far as the impact of migration on skill acquisition is concerned, Fargues (2008b) observes that "a shift from a remittances-driven to a human-capital-driven pattern of migration is underway" for AMCs, meaning that the decision to migrate is no longer solely driven by the willingness to send remittances back home, but also by the desire to make an adequate use of would-be migrants' human capital. Fargues (2008b) also adds that "today the links MENA states establish with their Diasporas are aimed at maximizing remittances and economic investments in the home country. Tomorrow, states will have to channel the diaspora's knowledge and skills. For that purpose, they will have to [create an environment] favourable to flows of ideas and knowledge", emphasizing the key role of social remittances in shaping the impact of migration upon AMCs (see section 9.3).

7. Behaviour on the labour market

7.1 Actual migration and behaviour

Migration can exert a direct impact on the labour-market participation of stayers when migrants come from households which earn their livelihood from family-run economic activities, such as small-scale agricultural concerns. As we have seen in section 2.1, the migrant is often the main breadwinner within the household, and this gives rise to the need to replace him or her in family-run activities in order to avoid a reduction in incomes. The book by Ennaji and Sadiqi (2008) analyzes the impact of the – predominantly male – migration from Morocco on the women left behind, and it finds that these women tend to assume roles in production activities that were formerly covered by male migrants. Nevertheless, as Ennaji and Sadiqi (2008) argue, "most migrant husbands would refuse to allow their wives to work outside the home because this work jeopardizes their social role and the image as household bread-winners". Ennaji and Sadiqi (2008) also provide evidence that migration is associated with a change in family structures, as 26.2 percent of the sampled women go back to live with their parents, who can help them in taking care of the children.[105] Such a change in family structure is

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104 ILO (2002) shows how the incidence of child work in Middle East and Northern African countries stands at 15 percent, a level that is lower than most other developing regions, but that nevertheless suggests that child work is far from being absent there.

105 This is so because AMCs are often characterized by "weak transportation and child care infrastructure [that] discourage women from going out to work, as does the lack of social support for children or the aged, the burden of whose care falls on women" (UNDP, 2006), and the women left behind do not seek employment because of "their inability to combine their work outside with duties as mothers and housewives" (Ennaji and Sadiqi, 2008).

clearly connected to the need for a greater female engagement in the labour market, and it suggests that migration *per se* can increase female participation rates in the labour market (see section 7.3 on the contrasting effect of remittances). Nevertheless, such an effect need not materialize: even in Palestine, when the husband migrates, women tend to live with their husbands' families, but this does not consolidate an active role for them in the labour market (Hilal, 2007). This happens because of the lack of opportunities, and because of the control that relatives exert upon the women left behind, who remain dependent upon remittances.

Thus, it is important to stress that such an increase in female participation is probably mostly confined to self-employment activities – such as family-run agricultural concerns or a retail trade – than to wage-earning employment, given the persistent and high levels of male unemployment even in migrant-sending areas. Hijab's argument then (1988) that those women left behind increased their participation in the labour market in Egypt as there was a need at the country level to mobilize women to replace migrant men, seems hard to defend and generalize upon.[106]

The direct impact of male migration on female participation in the labour market thus counteracts the divergence in labour-market outcomes across genders – specifically unemployment rates and labour earnings – that is induced by a reduction in the supply of male workers due to migration itself. While the latter, as argued in section 1.1, tends to widen the gap, the former helps in narrowing it down.

7.2 Prospect to migrate and behavior

Section 6.1 briefly recalled that there is some evidence that the level of unemployment among highly-educated individuals in AMCs is higher than among individuals with a low level of education, while Section 5 showed that emigration rates increase with the level of education. To what extent could the latter factor be driving the former? There is, to the best of our knowledge, no paper which has provided solid, empirical evidence in this respect, but it is, nevertheless, fair to say that the chances for the unemployment to increase substantially due to the high prospect to migrate are low. To see why this is the case, one can recall the basic mechanism described in Fan and Stark (2007b): the authors argue that the unemployment rate may rise provided that (i) wages for highly-educated individuals are stagnant, and (ii) the prospect to migrate induces more individuals to invest in higher education. While it is certainly the case that wages in AMCs countries are not market-clearing, the second condition required by Fan and Stark (2007b) seems – at best – unlikely to hold for most AMCs, in light of what we have discussed in Section 6.1. Hence, the mechanism offered by Fan and Stark (2007b) seems unlikely to work, perhaps with the limited exception of small countries, such as Lebanon.

A more subtle argument is depicted in the job-search model presented in Fan and Stark (2007a), where the effect on unemployment is determined by the effort that would-be migrants have to devote to try to migrate. De Haas (2007) highlights what he labels as the "social consequences of migration": migrant households in Morocco are now regarded as the new *elites*, which were previously determined on the basis of kinship and land holdings. Such a change in relative social positions has induced the members of old elite groups to aspire to migrate (McMurray, 2001), and this is likely to have reduced their incentives to actively participate in the domestic labour market, which reduces the necessary resources to climb up the social ladder. If migrants are perceived to be *success stories*, then this can significantly alter the labour-market behavior of natives, which wish to emulate them.

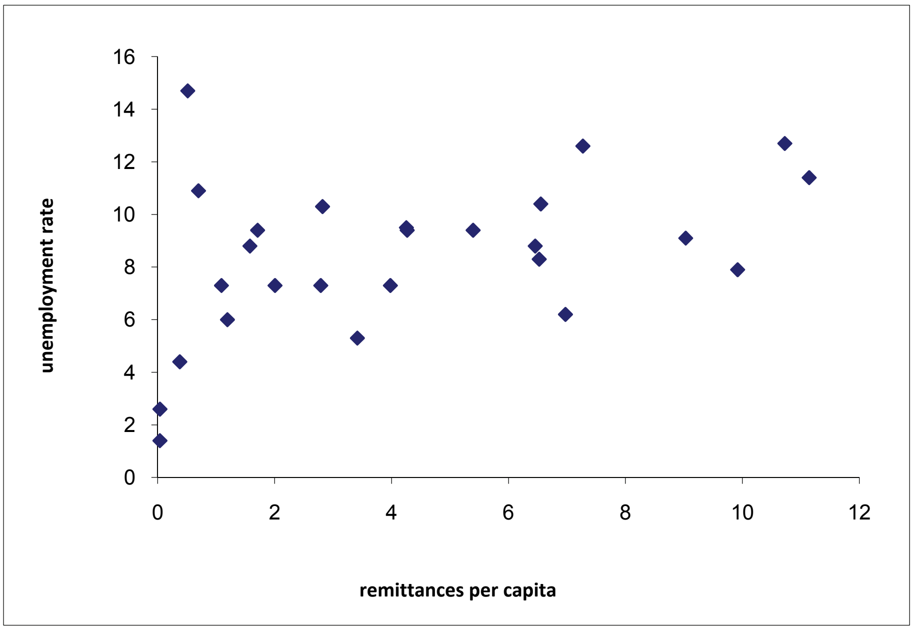
7.3 Remittances and behavior

Remittances can exert an influence on recipients' behaviour in the labour market through two main channels, namely the income effect that modifies the willingness to work in exchange for a wage, or

106 Hijab (1988) claims that in the 1980s women gained access to skilled occupations, and some highly-skilled women (such as teachers and health care workers) were also tied movers to the Gulf countries.

through the impact on the demand for labour in family-run activities which is determined by the use of remittances to finance small-scale productive investments (see Section 9.1 on this second channel). To date, no economic study has been undertaken to gauge the relevance of either of these two channels in AMCs, as the endogeneity of remittances with respect to labour-market conditions in the migrant-sending areas prevent us from drawing any conclusion on the causal relationship between remittances and prevailing wages and level of unemployment from the analysis of bivariate relationships.

Figure 7.1. Remittances and unemployment rates in the Egyptian governorates



Source: authors' elaboration on UNDP (1998) and Fargues

Figure 7.1 has been obtained using data on the remittances or savings of return migrants from Kuwait and Iraq to Egypt after the Gulf War in 1991, combined with local data on the unemployment levels from the UNDP (1998) Report on Egypt.[107] The figure suggests that the unemployment rate is higher in the Egyptian governorates that receive more remittances per capita.

One could reasonably assume that an external and stable source of income, such as remittances, is likely to discourage participation in the labour market in a context where there is a very high unemployment level, as in the AMCs. Thus, a high unemployment rate could drive migration, and the ensuing flow of remittances, so that one should not regard Figure 7.1 as providing evidence of the adverse effect of remittances on labour market participation, given that a causal relationship could run in both directions.

7.4 Social remittances and behaviour

The impact of migration on prevailing behaviour in the labour market is mediated by its impact on cultural attitudes, as the work by Hilal (2007) on the effects of male migration in the labour market

107 We are fully aware that we should have related remittances to participation rather than to the unemployment rate; still, we maintain that even the relationship depicted in Figure 7.1 is informative: if we account for the possible negative impact of remittances on the participation rate, then the positive relationship that we depict in the figure would have been even stronger.

participation of women in Palestine demonstrated (see Section 7.1). Male migration out of Palestine seems to have reinforced the diffusion of a conservative role for women in Palestinian society, which is backed up by old religious interpretations, which also manifest itself through changes in the forms of women's dresses (Hilal, 2007). Clearly, social remittances can differ widely depending on the destination countries of migrants, and Hoodfar (1996) addresses the question of whether Egyptian male migration represents a "'Feminization of Egyptian families' or a reaffirmation of traditional gender roles", as migration to the Gulf countries could lead to cultural changes along the lines described by Hilal (2007) for Palestine.[108]

De Haas (2006) argues that, at the Todgha oasis in Morocco, the change in social structures and the emancipation of subordinated groups through migration have led to the neglect of some traditional activities, which were regarded as having a low social status.

Demand side of the labour market

8. Consumption patterns

8.1 Actual migration and consumption patterns

The evidence of the impact of migration on consumption patterns in AMCs is regrettably limited, though this could be substantial and not limited to the impact on private demand that arises because of remittance transfers. Labaki (2006) focuses on the demand for consumption goods by Lebanese migrants, which allow domestic producers to broaden the basket of goods that they export, with an ensuing job-creation effect in the sectors that produce so-called *ethnic goods*, and in the trade sector. Similarly, Khelfaoui (2005) demonstrates that that the exports of Algerian products towards Canada has increased because of local demand on the part of the Algerian Diaspora there, which has also contributed to the development of communication facilities, and the increasing use of Internet due to the frequent contacts between emigrants and their families.

Conversely, de Haas (2007) emphasizes the impact on the demand for labour in the tourism sector in Morocco, as migrants who have a legal residence permit in the country of destination return home for their holidays. Along the same lines, Labdelaoui (2005) argues that tourism has developed in Algeria as a result of the visits of emigrants during their holidays, and that this is becoming a matter of interest for the Algerian authorities.

8.2 Return migrants and consumption patterns.

No empirical evidence has been gathered to see whether return migrants represent a relevant channel of transmission of consumption models from the countries of destination to AMCs.

However, we can advance a hypothesis based on the age of returnees: in section 3.2 we presumed that the transmission of consumption models through return migrants is more important the lower their age. Data from the MIREM project indicate that returnees in Maghreb countries are quite young: their average age is between 36 and 45 years. This is confirmed – for Tunisia – by the results of a survey on population and employment carried out in 2006, according to which the

108 The transfer of cultural norms does not run just in one direction: the paper by Antecol (2000) analyzes the gender gaps in labour force participation rates across different migrant groups in the United States, and she finds that half of the variation in fertility behavior across first-generation immigrants is explained by the gender gap which prevails in the home country, while cultural assimilation is greater for the second- and third-generation of immigrants. This suggests that limited effects upon the labour market of migrant-sending countries can be expected in the early phases of a migration episode, while these effects clearly build up over time.

average age of return migrants is between 30 and 44 years (Fourati, 2008). Finally, ELMPS (2006) data shows that 35 percent of returnees in Egypt are less than 40 years old, and 35 percent are between 40 and 50 years old.

8.3 Remittances and consumption patterns

As we argued in section 2.1, the stimulus that migration – via remittances – brings to private demand produces substantial effects on the labour market only inasmuch as it is directed towards domestically produced goods and services. Regrettably, as Gallina (2006b) observes, there is limited information on the pattern of remittance used in AMCs countries. Some information – albeit coming from a survey with a limited coverage – are provided by EIB (2006), which analyzed the distribution of remittances across alternative budget items in all AMCs but Palestine. Table 8.1 reports the main findings from this survey, which demonstrates that everyday expenses absorb most of the income arising from remittances, while limited resources are devoted to investments. Schramm (2009) provides evidence – for Tunisia, Morocco and Egypt – that suggests that basic consumption needs (food, heat and clothing), absorb most remittances.

Table 8.1. Use of remittances in AMCs

	Daily expenses	Payment of school fees	Building a house	Setting up a company	Investments	Other	Number of interviewees
Algeria	*45*	*13*	*23*	*3*	*5*	*11*	*64*
Egypt	*43*	*12*	*18*	*-*	*15*	*12*	*31*
Jordan	*74*	*16*	*4*	*-*	*6*	*-*	*40*
Lebanon	*56*	*24*	*5*	*5*	*5*	*5*	*41*
Morocco	*46*	*31*	*16*	*-*	*5*	*2*	*40*
Tunisia	*-*	*23*	*34*	*2*	*16*	*25*	*40*
Syria	*61*	*11*	*8*	*-*	*-*	*20*	*49*

Source: EIB (2006)

Still, the argument that most recipient households report that daily consumption needs absorb the greatest share of their remittance incomes does not suffice to dismiss the concern that remittances may fuel the demand for imported products. [109] An interesting – although admittedly extreme – case is represented by Algeria, where most of the remittances are transferred in kind rather than in cash, as migrants distrust the local financial system. Khachani (2004) argued that the value of goods imported by Algerian migrants who temporarily returned home on holidays was estimated at $2.5 billion per year; needless to say, such a huge amount of resources fails to generate any job-creation effect, as they cannot be directly used for productive investments, being mostly in the form of consumption goods. By the same token, Nassar (2005) argues that Egyptian recipient households devote a sizeable part of remittances to accumulating hoards of valuable items, such as gold and precious stones, and this dampens the ensuing stimulus on the demand for workers. [110]

Real estate can also represent a sizeable store of value for recipient households: Fletcher (1999) demonstrates that in Tunisia emigration areas have experienced a remittance-induced sharp raise in

109 Note that respondents to these kinds of surveys always report that remittances are earmarked for basic consumption expenditures, although this does not suffice to rule out – given the inherent fungibility of incomes – the possibility that they actually lead to a significant reshaping of expenditure patterns.

110 Note that such behaviour can be linked to the temporary character of remittance incomes, and to the probability that such a flow might come to an unexpected end, because of the major fluctuations in the demand for immigrant workers in the Gulf countries.

real-estate prices, something that Vermeren (2001), quoted in Gallina (2006b), finds for the migrant-sending town of Nador in the North of Morocco, where the land prices increased more than in the surrounding areas. Labaki (2006) shows that a large part of the remittances sent to Lebanon in the 1980s was used for real-estate investments, buying land or houses. Nyberg-Sørensen (2005) observes a boom in the construction sector in the Rif region in Morocco, where 71 percent of migrant households buy land, or a house or repair old houses. Clearly, professions and wages related to the construction sectors benefited from this boom. According to de Haas (2007), the investments that migrant households make in real estate have several positive consequences in Morocco, where construction is one of the pillars of the economy and there is a persistent scarcity in the urban housing market[111].

De Haas (2007), although admitting that the information available on the use of remittances in Morocco is limited, tries to formulate a hypothesis based on his detailed literature review[112]. According to the author, the uses for remittances change across the life cycle: at the beginning of the migration experience, migrants and their households spend for their basic necessities and for the housing (real investments have a peak 5-14 years after leaving); then they start to make investments in the agricultural sector; 25 years from the beginning of the migration experience, they use the savings to invest in a non-farming business. If this theory is right, we would expect that the older the migrant, the more likely he will be to invest in an economic activity (see section 9.1 for the links between remittances and investments).

The possibility that the demand stimulus brought about by remittances to AMCs could leak out to imports is strengthened by the limited industrial base of these countries, which went through a long period of import substitution industrialization. According to the World Bank (2008b), the share of the manufacturing sector in the GDP of AMCs ranges from 11.4 percent in Lebanon to 19.2 percent in Jordan, so that – especially as far as consumer durables are concerned – the demand is likely to be directed towards imported goods. Such an effect is strengthened once remittances lead to inflationary pressures, and to the ensuing appreciation of the exchange rate which makes foreign goods cheaper. This suggests that there might be a vicious circle operating here: migration is induced by the limited capacity of domestic labour market to absorb the domestic supply of labour, which is connected to the small size of the domestic industrial base, which in turn prevents the demand stimulus brought about by migrants' remittances from being directed to domestically produced goods, and thus lead to a sizeable job-creation effect.

In Palestine, as Hilal (2007) observes, "the daily work of commuting in and out of Israel and its settlements by a large percentage of the Palestinian labour force created and maintained a sizeable working class, but without creating its own bourgeoisie or business class". A middle-class pattern of consumption has been created but without any accompanying impact on the Palestinian economy, which remained dependent on imported Israeli commodities. Palestinian workers, especially the ones living in the villages and in the camps, benefited from the jobs offered in Israel, but Palestinian industry, agriculture and basic infrastructure has been marginalized due to this dependence.

111 De Haas (2003) finds that 71.1 percent of migrant's remittances are used in the real estate sector, 11.3 percent in the agricultural sector and 17.5 percent in non-agricultural enterprises. Kachani (2005) observes that in the INSEA survey on Moroccans living abroad, published in 2000, investments in real estate undertaken by migrants in the home countries amounts to 83.7 percent of all investments, while 7.5 percent is devoted to agriculture and 4.9 to the retail trade sector. Fadloullah et al. (2000) observe that the investments in the real estate have been so numerous that several villages have been transformed into towns.

112 In this paper the author tries to review all the literature that is not translated into English and that is not in the academic debate. This effort is extremely important and it permits us to have more information on the impact of migration on Morocco above all. Among his main references: Khachani (1998, 2002), Hamdouch (2000), de Haas (1998, 2001, 2003), Fadloullah et al (2000), Dhorte et al (2000), Bonnet and Bossard (1973), Bencherifa (1991, 1993), Popp (1999), Bencherifa and Popp (1990, 2000), Berriane (1996, 1997), and Refass (1999).

As far as remittances to Jordan are concerned, these have been representing an important income source since the 1980s: consumption levels of households with a migrant abroad have been high thanks to the remittances received. The residential activities and the import sector benefited the most from this inflow, but also the agricultural technology improved, determining an ensuing job-creation in this sector, together with the building and the service sector. The Jordanian government relied on remittances to sustain the Balance of Payments, and this revenue item has contributed to the creation of jobs in the public sector. The flip side of this coin was that, when remittances declined due to the political instability of the area, Jordanian public debt increased substantially, and this – via the ensuing reduction in the size of the public wage bill – led to a significant impoverishment of the middle class (Chatelard, 2004). Nevertheless, remittances from Jordanian migrants are still very important in sustaining the consumption level of recipient households, as remittances have steadily increased between 1994 and 2006 (Arouri, 2008).

8.4 Social remittances and consumption pattern

Though it is - to say the least – uncontroversial that the transfer of ideas exerts a powerful influence on the pattern of consumption in the areas of origin of the migrants, as social remittances have been found to influence much more deeply-rooted phenomena such as fertility choices in AMCs (see section 6.5), only limited systematic research has been conducted on this topic. As migration flows often follow previous colonial ties – as in the case of migration from the Maghreb countries to France – it is hard to assess to what extent the old colonial power would have exerted cultural influence even without the later migration flows.

9. Investments and entrepreneurial models

9.1 Remittances and investments

It is well-known that is not possible to disentangle the analysis of the economic effects of remittances upon recipient countries from a proper understanding of the determinants of the underlying migration process (Taylor, 1999), as the same factors which induce people to migrate can prevent remittances from producing their full development potential. For instance, the use of remittances for productive investments crucially impinges upon the economic and institutional context in the migrant-sending areas, and a telling – albeit admittedly extreme example – of such a relationship has been presented in section 8.3, where we showed that remittances to Algeria are mostly transferred in kind rather than in cash.[113] This reflects the distrust of the migrants in the domestic financial system, and clearly hinders a direct productive use of remittances. Though remittances still allow recipient households to employ resources from other income sources for productive investments, such an outcome is unlikely when the basic preconditions for investments are not in place, a conclusion that has been advanced for AMCs by Lazaar (1996), Abdel-Fadil (2003) and Gallina (2006a).

The amount of remittances used for productive investments in some countries is not negligible: 30 percent of foreign capital that is invested in Syria comes from emigrants living in the Gulf (Kawakibi, 2009), in Morocco on average current and return international migrants invest respectively four and five times more that non migrants (de Haas, 2003), in Palestine migrants have invested a lot in their home countries after the Oslo accord (see below), and in Jordan remittances have always been considered extremely important for starting up a business (Chatelard, 2004)

Gallina (2006b) argues that – assuming that in the Mediterranean region between 5 and 7 percent of remittances are spent for productive investment in micro and small enterprises – between $1.5 and $2.1 billion is invested annually thanks to remittances. This low level of investments can –

113 The only sector where Algerian emigrants invest their capital accumulated abroad is real estate (Khelfaoui, 2006).

according to Gallina (2006b) – be traced back to the lack of economic incentives for productively employing these earnings, which are mostly devoted to financing basic consumption needs, thus increasing recipient households' welfare. The limited evidence of a direct productive use of remittances goes against the fact that remittances can be just a temporary source of income, which economic theory predicts should not have a large effect on current consumption levels. The temporary character of remittance income is also compounded by its possible volatility, as migrants' ability to transfer resources back home is influenced by the ups and downs of the business cycle in the destination countries, which tend to be more pronounced for migrants to the Gulf, which are exposed to the major fluctuations in the world price of oil (Glytsos, 2001), and to a lesser extent for Western Europe. Still, as seen in section 8.3, households react to the temporary and possible volatile character of remittances by using them to buy up stores of valuables, rather than ensuring a longer lasting source of income through risky productive investments.

This rather pessimistic view of the impact of remittances on investments based on the micro evidence on the behavior of recipient households has been recently challenged in a paper by Billmeier and Massa (2009), who focus, instead, on the indirect effects of remittances on investments. Billmeier and Massa (2009) analyzes a panel of 17 countries in the Middle East and Central Asia, which includes Egypt, Jordan, Lebanon, Morocco and Tunisia, to test whether remittances contribute to the deepening of capital markets in these countries. The authors find that migrants' remittances have a strong impact on the level of capitalization of the stock markets in non-oil exporting countries, as they represent a source of private savings and they increase the liquidity that circulates in the economic system[114]. Such a conclusion suggests that the macro rather than the micro impact of remittances on investments can be relevant, and it also entails that the labour market effects of migration due to remittance-financed investments are not confined to migrant-areas.

The above argument is also corroborated by de Haas (2006), who shows that the use of remittances for investments in Southern Morocco has contributed to the diversification of the economic system, and the urbanization of the population. This specific example suggests that a country – not to mention the whole AMCs area – probably represents a unit of analysis that is unfit to gauge the actual impact of remittances on the labour market via productive investments, as there is also relevant heterogeneity within countries in the factors that mediate how the demand stimulus brought about by migrant transfers is matched by a supply side response.

Saad (2005) emphasizes the investments by Egyptian migrants based in France in the agriculture sector in the area of Beheira, and in the real estate sector in the Northern Coast or in Cairo. Fletcher (1999) also finds an increase in the concentration of land tenure in the hands of few households connected to migration, which has in turn led to an increase in unemployment in rural areas, a finding that is in line with what Saad (2005) observes in the Mid Bad Halawa village in Egypt.

Schramm (2009) observes that remittances to Maghreb countries give only a limited contribution to the development of entrepreneurial activities, which are mostly concentrated in the non-traded service sector, or in agriculture. Poor recipient households undertake small productive investments in cattle, in setting up a small retail shop, or in buying a car to be used as a taxi, while better off households opt for a restaurant or for a hotel. Provided that these activities are on a small scale, then the direct job-creation effects that they induce are mostly exhausted within the recipient household itself, which is likely to provide most of the required labour supply: still, Schramm (2009) argues that remittance-induced investments contributed as much as 2 percent of the total number of new jobs created in Tunisia over the 1997-2001 period. The bias of remittance-financed investments towards the non-traded sector was also found by Labaki (2006) for Lebanon, where the part of remittances which was not directed to the real-estate sector was used to invest in the retail trade or in a transportation activity.

114 Kachani (2005) argues that migrants show an increasing interest in investing in the Moroccan stock market, a finding that is in line with the more general conclusion reached by Billmeier and Massa (2009).

This – admittedly incomplete – evidence suggests that the job-creation effects due to remittance-financed investments tend to be limited, and it could be fostered by the adoption of complementary public policies aimed at removing the institutional and economic disincentives to invest. Such an effort can hardly be expected to be undertaken by the migrants, as there is limited evidence of cooperative actions led by migrant associations (Gallina, 2006b). The collective mobilization of resource for investments in Morocco is scarce, and confined to a few cases, like the association of Moroccan migrants in Catalonia - which invests in agriculture development in Northern Morocco, and some social investments from Moroccan migrants to Southern France.

Hillal (2007) describes how investments by Palestinian emigrants were extremely important after the establishment of the Palestinian Authority. Banks and insurance companies opened in West Bank and Gaza, and a law to encourage foreign investments was passed and several activities – which were previously not allowed under the Israeli occupation – were created. In this phase. The role of expatriate Palestinian businessmen who had made their capital in the Gulf became very important for the country. But, starting with the military occupation of the West Bank in 2002, the uncertainty of investments in Palestine has again become a concern and this discourages the investments of migrants, providing a telling example of how the job-creation effect due to migration is highly dependent on the prevailing economic and institutional environment.

Zekri (2009) provides data on the number and typology of associations of Tunisian emigrants, showing that most of them explicitly pursue some sort of social objectives. The Tunisian government acknowledges the importance of these associations abroad to attract the capital of emigrants towards social investments in the country. Zekri (2009) also reports data on Tunisian investors residing abroad from the Agency of Industry Promotion: from 1988 to 2007, 43,912 jobs have been created thanks to investors from abroad, and around $385 million have been invested in more than 10,000 projects, in particular in the service sectors: data comes from the Agency of Industry Promotion. The Tunisian government is aware of the potential benefits for the country from the investments of its emigrants. This is why it offers several advantages (also fiscal advantages) to the migrants who want to invest in Tunisia.

9.2 Return migrants and investments

As we observed in the introduction, when migration occurs predominantly on a temporary basis, then we need to focus on returnees in order to fully understand its impact on the labour market; one of the main regularities that is observed for return migrants – and AMCs make no exception in this respect, is that they tend to opt out of salaried jobs. A disproportionate share of return migrants opt for a self-employed occupations and the MIREM project shows that 27.7 percent of the sampled returnees to Algeria, Tunisia and Morocco became employers or independent workers, while 33.2 percent opted for a salaried occupation. McCormick and Wahba (2001) provide evidence that the duration of the migration experience and foreign savings increase the probability of becoming an entrepreneur upon return to Egypt, though a recent contribution by Wahba and Zenou (2008) has cast some doubts on this conclusion, as the loss of social capital that migration entails makes it harder for Egyptian migrants to set up a successful enterprise. Preliminary analysis of the data from the ELMPS 2006 reveals that a significantly larger share of returnees is engaged in an entrepreneurial activity, and – more interestingly – that the survival rate of the MSEs run by return migrants between 1998 and 2006 exceeded by 14 percentage points the corresponding figure for stayers.

Table 8.1. Return migration and entrepreneurial activities

	returnees	stayers	t-test	obs.
Entrepreneurs in 1998, percent	20.73	5.18	11.88**	17,361
Entrepreneurs in 2006, percent	27.37	8.38	11.68**	17,361
Survival rate of entrepreneurial activities, percent	84.04	69.93	2.36*	923
College graduates among entrepreneurs, percent	12.51	8.12	0.97	923
Enterprises established after 1980, percent	86.89	64.66	4.23**	923

Notes: entrepreneurs defined as individuals reporting to be either self-employed or employers, following McCormick and Wahba (2001); ** and * denotes statistical significance at the 1 and 5 percent confidence level respectively.

Source: authors' elaboration on data from ELMPS (2006)

As the data from the MIREM project shows, the relationship from return migration and the occupational choice upon return depends on the employment status experienced in the countries of destination: the number of migrants from Morocco, Algeria and Tunisia who were self-employed in Italy was higher than the corresponding figure for migrants to France, who were less likely to opt for an entrepreneurial activity upon return, a choice that is also influenced by the on-the-job training received abroad. Also levels of integration in the host country matter: the more integrated are generally the ones who benefit more from the migration experience in terms of savings, but – as evidenced by Hammouda (2008) for Algeria – they are less likely to come back to the origin countries.

Clearly, also the economic and institutional environment which prevails at home matter, and the share of returnees who carry out some productive investments upon return is substantially lower in Algeria (17 percent) than in Morocco or Tunisia, where the corresponding share is above 40 percent, in line with the arguments described in Section 9.1. They mainly invest in small enterprises with less than 10 employees – with an ensuing limited job-creation effect. In line with the arguments by Wahba and Zenou (2008), social capital plays a key role: about 80 percent of investors report having received help from family of friends in the origin country. The sectors which attract most investments by returnees are: the wholesale and retail trade (36.0 percent), hotels and restaurants (17.9 percent), agriculture (17.5 percent), manufacturing (11.9 percent) and construction (16.3 percent). Trade is also the sector that attracts the majority of returnees from the Gulf in Syria (Kawakibi, 2008).

Sayre and Olmstead (1999) argue that returnees in Palestine after the Oslo accords invested mostly in the service and construction sector, but also, to a lesser extent, in the infrastructures and in the light manufacturing sector; the authors also observe that a large number of skilled migrants have been employed in the public administration sector and this led to an increase in inequality between families with migration experience and the families without such an experience.

9.3 Social remittances and investments

As far as investments are concerned, the single most relevant cultural effect of migration is probably the development of a banking culture (Schramm, 2009), as a larger share of the population in migrant-sending countries becomes familiar with financial services through remittance transfers. This, in turn, can create new opportunities to undertake productive investments.

A powerful channel of the transfer of cultural norms which can influence the choice of entrepreneurial models is represented by migrant associations, whose role in Syria, Morocco and Lebanon is discussed by respectively Dumont (2008), de Haas (2007) and Labaki (2006). The Lebanese government supports two public programs (TOKTEN, *Transfer Of Knowledge Through Expatriate Nationals*, and IDAL, *Investment Development Authority of Lebanon)* to favor the transfer of social remittances to migrant destination countries.

According to Khelfanoui (2006), the contribution of the North American Diaspora to the development of Algeria in terms of technological transfer is much more important than the financial one. There are a number of initiatives, both in the cultural sector and in the scientific sector with the aim of creating a partnership between intellectuals living abroad and those who remained in the origin country. ALASCO is an association for scientific cooperation that was born with this specific goal to arrange periodical visits of Algerian scientists working in US to meet Algerian colleagues. Moreover, partnerships have been created by the Government with the US Embassy, and with a University in Quebec, while in the fields of Information Technology, Human Resources and hydrocarbons have already produced cases of beneficial cooperation.

The Tunisian Government also shows an interest in the development of contacts with its *brains* abroad in order to expand the beneficial effects of skilled migration for the country: scientific conferences to establish relationships between the competences abroad and Tunisian Universities have been organized, and a Coordination Unit has been established in order to create a national strategy to use the knowledge of emigrants (Zekri, 2009).

10. Conclusions

Migration produces deep and far-reaching effects on the labour markets of Arab Mediterranean Countries, through an array of different - but closely intertwined - channels, which have been analyzed in this paper both from a theoretical and an empirical perspective. The complexity of the effects induced by migration, and the limited empirical evidence which has so far been gathered with respect to AMCs, entails that putting together the pieces of the puzzle that have been separately described in the previous section is a challenging task, which should not be expected to provide a neat and consistent picture. Some knowledge gaps – notably on the impact of migration on the level and the distribution of labour earnings – remain, and no conclusions can be drawn about them, but this paper has contributed to filling other gaps, collecting relevant arguments which have been put forward in different scientific disciplines.

There is no doubt that migration reduces the pressure on the labour market, thanks to demographic factors, and this is particularly true in small-sized AMCs. Moreover, migration can also exert an influence on these factors themselves, through the transfer of cultural norms from the countries of destination which reshape fertility decisions (Fargues, 2007b). This indirect – and admittedly medium-term – indirect effect can either strengthen or dampen the initial direct effect, depending on the cultural values that prevails in destination countries. This means that the countries of the Mashreq stand to benefit less than the countries of the Maghreb, whose migrants move predominantly towards the low-fertility European countries, and indeed – as the case of Morocco shows – the unemployment-reducing effect of migration can also induce a substantial internal mobility towards migrant-sending areas.

The influence of migration is uneven across skill groups, as the data – which also include non-OECD destinations – consistently show that the emigration rates from AMCs are higher for highly educated individuals. A review of, regrettably indirect, elements suggest that the prospect to migrate is unlikely to induce substantial increases in the private investments in education in AMCs – with the exception of Lebanon, Jordan and, to a lesser extent, Egypt – that would aggravate the problem of graduate unemployment. This suggests that the *brain drain* should not rank high among the concerns of AMCs, which face notable difficulties in providing adequate employment opportunities to their most talented workers.

The reduction in unemployment is not just mechanically due to the reduction in the labour supply, but also to the influence that migration exerts on the behavior of the working-age population. Young individuals from AMCs who have access to migration networks have a higher propensity to migrate than the rest of the population, and this reduces their incentives to actively seek a low-paid domestic occupation. They devote their efforts, instead, to arranging their own migration project. The theoretical and empirical arguments revised in this paper cast serious doubts on the idea that migration can positively influence female participation in the labour market, which is notably low in AMCs. Migration, which is predominantly male, directly increases the demand for female labour in households with family-run economic activities, as this kind of job encounters a weaker cultural resistance – which can also be reinforced through the transfer of social remittances from destination countries –than waged female employment (Ennaji and Sadiqi, 2008). The demand for female employment within family-run economic activities can also be increased if migrant remittances are used to finance small-scale productive investments, while the effect of remittances on the incentives to seek out waged employment are reduced by the positive income effect they bring about. Furthermore, the opportunities to work outside the household is also constrained by the need to take care of the children left behind with the wife of the migrant. Though a woman may get some support for the care of the children from her relatives, this choice could further reduce her search for a job which is perceived as being detrimental to the social status of the family. This means that migration out of AMCs has, in the short-run, a limited positive – and possibly even negative – effect on female participation on the labour market, which is mostly produced within family-run economic activities. Things *may* change in the medium to long term, provided that social remittances contribute to reduce social resistance towards active female engagement in the labour market.

The labour markets of AMCs also respond to the effects that migration produces on their demand side, and the available evidence on the influence of migration on the patterns of consumption suggests that a non-negligible part of the demand stimulus brought about by migrant remittances leaks out towards foreign-produced goods – especially for the smaller countries with a limited manufacturing sector, while the domestic job-creation effect is predominantly limited to low-skilled occupations. The demand for real-estate investments systematically experiences a boom in migrant-sending areas, and this gives rise to a boom in the construction sector, where new job opportunities emerge. Though this partial effect is positive, it should also be considered as revealing of the lack of opportunities for migration-financed productive investments, which could produce a greater and longer-lasting effect in term of demand for labour. The evidence on the effects of migration – mostly via remittances – on investments is limited and mostly anecdotal, while evidence on the effect of return migration on investments in AMCs, which appeared to be one of the most beneficial effects of migration upon the origin countries, is still limited, and controversial. Moreover, return migration to the region – and most notably to the Mashreq countries – has often been induced by political instability in the countries of destination, so that it has represented a destabilizing factor for the labour market in the origin countries.

There are some promising signals that remittances to AMCs are stimulating the deepening of the credit and equity markets. This could ease the set-up of new enterprises, which is threatened by an unfavorable institutional and economic environment, one of the root causes of migration. When economic migration is determined by the scarcity of investment opportunities, rather than by the lack of financial resources to undertake them, then migration *per se* can hardly be expected to generate these missing opportunities.

Though we have been able to advance some tentative conclusions, there are various labour-market outcomes that need to be further analyzed before the puzzle of the impact of migration on AMCs can be better understood. This paper has laid out a possible analytical framework that could guide future research on the effects of migration on the labour market of Arab Mediterranean Countries, which should not be restricted to the economic domain, as any economic effects are profoundly shaped by migration-induced social and cultural transformations.

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Chapter III – Thematic Background Paper

EU migration policy towards Arab Mediterranean countries and its impact on their labour markets

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Abstract

The paper proposes to analyse to what extent emerging EU common immigration policy, including the EU's new "Global Approach to Migration" can match the Euro-Arab Mediterranean labour market's needs and demands while fostering and consolidating cooperation in the Euro-Arab Mediterranean context.

To this end, the paper outlines and assesses, in its first section, the gradual emergence of a harmonised EU framework on economic migration. More particularly, it sheds light on the general context of EU migration policy, probes into the development of a common labour migration strategy, and then analyses the nexus between the Global Approach to Migration and economic immigration policy since 2005.

In the second section, the paper reassesses the current tools and instruments aimed at implementing the Global Approach to Migration and examines whether they are applicable to Arab Mediterranean Countries. It discusses in detail the dynamics and trends of highly-skilled migration in the Euro-Mediterranean context and evaluates the pertinence and added value of the Blue Card. It also looks at how temporary migration schemes and integration policies might evolve into viable instruments while incorporating the Global Approach into the Euro-Arab Mediterranean context.

In the third section, the paper evaluates whether and to what extent the Euro-Mediterranean Partnership, as a multilateral framework for relations between the EU and Arab Mediterranean Countries, has integrated migration issues, and to what extent the European Neighborhood Policy, which gave new impetus to the Euro-Mediterranean Partnership, embodies at bilateral and regional levels the Global Approach to Migration.

In its final part, the paper offers some conclusions regarding EU labour immigration policy and its potential and expected impact in Arab Mediterranean Countries. Moreover, it highlights some recommendations and policy options for reinvigorating present tools and policy tracks in the Euro-Arab Mediterranean region. More precisely, the paper recommends the emergence of clearer migration orientation line at the EU level with a view to adopting a more coherent and consensual approach towards Arab Mediterranean Countries. It also advocates refining and improving the *comprehensiveness* as well as the *specificity* of the Global Approach to Migration by developing certain tailored policies to the region and devising specific institutional and legal tools adapted to EU-Arab Mediterranean labour mobility. Moreover, the paper advocates *the contextualisation* of the Global Approach to Migration at a bilateral level between EU member states and Arab Mediterranean Countries and recommends monitoring current and previous bilateral experiences so as to evaluate costs and benefits as well as extract best practices for cooperation.

Highlights

The paper discusses to which extent emergent EU labour and immigration policy developments in conjunction with EU's Global Approach to Migration (GAM) can match the Euro-Arab Mediterranean labour market's needs and demands. Moreover, it assesses against which policy, economic and legal benchmarks cooperation mechanisms and opportunities in economic migration and mobility could be developed and consolidated.

The Euro-Arab Mediterranean context is currently the theatre of groundbreaking opportunities in the field of migration. It is noteworthy that the Global Approach to Migration takes into consideration important realities at work in the Euro-Mediterranean region and has a particularly promising potential. In addition, the current nexus between the European Mediterranean Partnership and the European Neighbourhood Policy (ENP) could serve as an institutional platform that integrates the GAM objectives, hence paving the way for more proactive cooperation patterns in the migration field.

Notwithstanding this favourable context which predisposes the two shores of the Mediterranean towards more cooperation, **the following objectives at EU, Euro-Arab Mediterranean and bilateral levels are still to be attained:**

- Striving towards more policy convergence at the EU level and in the Euro-Mediterranean context;
- Encouraging the emergence of proactive patterns in immigration/emigration policies in the Euro-Mediterranean region;
- Developing a more symmetrical "needs- and demand-based" economic migration approach in the EU-Arab Mediterranean context;
- Refining the GAM and ensuring its comprehensiveness and inclusiveness potential;
- Assessing the efficiency and adequacy of instruments envisaged by the GAM , and how, if duly implemented, they could, indeed, respond to the needs of both sides of the Mediterranean;
- Encouraging more skilled migration in the Euro-Arab Mediterranean and devising tailored policy and legal instruments to this end.

More particularly:

- Empowering institutions and legal channels addressing the recruitment of labour on both sides of the Mediterranean;
- Easing access to work permits in the EU space and inside the EU;
- Encouraging visa and institutional policies that favour temporary patterns of migration and mobility;
- Refining temporary migration programs and making them more attractive by guaranteeing social rights and the portability of benefits even if such programmes are only part and parcel of a wider labour strategy;
- Improving the recognition of educational degrees in the EU and creating more institutional and legal synergies between academic institutions from either side of the Mediterranean;
- Concretising and contextualising the GAM by

1. Initiating bilateral and regional consultative processes (RCPs) on how to launch as well as implement mobility partnerships and circular migration schemes in the Euro-Arab Mediterranean countries;

2. Giving prominence to bilateral initiatives which match the GAM objectives between EU member states and Arab Mediterranean Countries;

3. Monitoring current bilateral experiences in the Euro-Mediterranean context and identifying positive gains and outcomes so as to enhance and encourage prevailing and future cooperation mechanisms.

Introduction

At the end of the 1990s, empirical research and policy debates revolving around the effect of emigration on the economic development of origin countries received additional impulses.

Until that time a common consensus had prevailed: the impact of migration on economic development was considered more positive than negative, and was thought to be the result of two divergent forces. The first negative force was brain drain which not only involved the departure of educated migrants, but also the natural selection of the most brilliant and risk-prone among the pool of potential migrants. The positive force was remittances which were considered to be beneficial both for the aggregate economy and for the migrant's family (Kapur 2005, Adam and Page 2005). It was commonly argued that remittances alleviated poverty, increased schooling levels and reduced child labour and were useful for the sending country's balance of payments. Moreover, the debate concentrated on the likely profitable use of remittances, mostly employed in consumption and for buying a house or a piece of land, and only partially for productive investments. Policy interventions tried to favour the allocation of remittances in more productive assets by granting loans to start a business or to buy a house even before the migrant's return to the origin country.

Two lines of research have, however, cast doubt on this common vision pertaining to the effects of migration on the origin country: on the one hand, the negative effect of brain drain and, on the other, the positive effects of remittances were both questioned.

The "brain drain-brain gain" literature (Stark, Helmenstein and Prskawetz 1997, 1998; Mounford 1997; Beine M, Docquier F., Rapoport H., 2001, 2003) shows how the augmented probability of successful emigration among the more educated stimulates investment in education among potential migrants. The result is an increase in the number of educated workers in the origin country. While part of this labour force will eventually migrate, a more educated labour force, beneficial to the growth and long-term development of the country, will remain in the country, and thereby attract foreign investments.

The other strand of literature highlights the negative effects of remittances on short- and long-term growth (Chami et al 2005). The negative effect consists in reducing the incentives for participation in the labour market and hence brings about a subsidized economy.

Nevertheless, it is noteworthy that whereas empirical evidence on the second point exists, evidence revolving around the brain gain effect is very limited (Faini 2006). Thus, a widespread view is that migration is good for the migrant and for his/her close family because it alleviates their poverty, but it is not positive in the long run either for the migrants' relatives or for their country. By creating a subsidized economy, it forces future workers to follow emigration patterns as employment prospects in the origin country remain slight.

In the light of these doubts, the compromise on which the migration policies of the above-mentioned destination countries was based was no longer valid. Permanent migration was accepted by destination countries even if they "wanted labour more than people". Still, in many instances, various difficulties in migrant integration both in society and in the labour market were striking. Also, some third-country nationals were more successful than others in integrating into the society of destination countries. The long-term costs that the host country had to bear in integrating foreign migrants were compensated for, it was believed, by short-term benefits in the goods' market.

Furthermore, host countries had already many problems induced by immigration: competition in the labour market (no significant evidence exists on negative effects caused by migration on native wages and only weak evidence exists on its effects on native employment); the cost for the welfare state (no evidence of welfare shopping, evidence of a larger than average use of welfare, but not if the individual characteristics of the migrants are considered) and assimilation (significant evidence that they do not economically assimilate with natives) which results in difficult economic and social integration.115 Thus, the North had the need to revise its immigration policy. New evidence related to the negative effect of permanent migration in the sending countries offered the opportunity to revise migration policies to give more legitimacy to an approach whose pillars rest on satisfying the destination countries' labour demands whilst solving the permanent migration dilemma.

The "Global Approach to Migration",116 promoted by the European Union (EU), could, in our opinion, match this new spirit of cooperation provided it develops and follows up with concrete instruments to enhance a three-way approach redefining the movement of people in origin and host countries, and hence providing a better response to pending challenges and bringing benefits to all participants in the migration process: the non-migrants in the origin and host countries, and the migrants themselves.

Still, the underlying proviso is that migration has to be a positive sum game and that some of the previous habits have to be altered. The fact that the European Council declares that "both challenges and opportunities of migration for the benefit of all is one of the major priorities for the EU at the start of the 21st century" (European Council Conclusion December 2006) shows that changes are indeed taking place in the way that migration policy is shaped. So the 2006 European Council stresses the need to give "consideration to how legal migration opportunities can be incorporated into the Union's external policies in order to develop a balanced partnership with third countries adapted to specific EU Member States' labour market needs", and to explore "ways and means to facilitate circular and temporary migration…".

These preliminary statements notwithstanding, it is important now to better understand how current political, institutional and legal elements in the Euro-Arab Mediterranean context could converge so as to define the premises and applicability of the Global Approach Paradigm. It is worth noting here that mobility trends induced by legislation, which previously constrained the migrant's natural propensity to circulate freely, need to be revised in the light of new incentives. Hence, an assumption that has to be verified is whether promoting temporary migration could mitigate spontaneous illegal migration, reduce brain drain and contribute to eliminating the subsidized economy effect. Furthermore, more efforts should be invested in assessing whether international cooperation – in this case, EC/EU relations with the southern shore of the Mediterranean – might not foster a more positive climate for such a change.

In the light of these observations, this paper proposes to analyse to what extent the new orientation guidelines in the EU immigration and labour policy can match Arab Mediterranean countries' (AMC) labour markets and, more generally, their development needs. To this end, the paper will outline and assess, in the first section, the gradual emergence of a harmonised EU framework on economic migration. It will describe the general context of EU migration policy, dwell on the development of a common labour migration strategy, and then analyse the nexus between the Global Approach to Migration and economic immigration policy since 2005. This section will also analyse if and to what extent the new Global Approach is – at least in theory – an integrative process that could adequately meet the needs and demands of the Euro-Arab Mediterranean zone while providing a viable ground for a comprehensive dialogue on economic migration.

In the second section, the paper will reassess the current tools and instruments aimed at implementing the new "Global Approach to Migration" and will ask whether they are applicable to Arab Mediterranean countries. It will particularly discuss the pertinence, implementation and "added value" of highly-skilled migration and the Blue Card Directive, temporary migration and integration policies as viable instruments to embody the Global Approach in the Euro-Arab Mediterranean context.

115 See the OXREP 2008 monographic number vol 24, 3 or Venturini A., 2008, ILO

116 On the necessity of developing a real "Global Approach to Migration" see the European Council Conclusions of December 2005 and the appendix "Global approach to migration and Priority Actions focusing on Africa and the Mediterranean". But the content of the conclusions are quite weak with regard to the Global Approach concept. For a more developed approach see: European Council Conclusions, December 2006 and the Commission Communication, "The Global Approach to Migration one year on: Towards a comprehensive European migration policy", COM (2006)735

In the third section, the paper will assess to what extent the Euro-Mediterranean Partnership, as a multilateral framework for relations between the EU and Arab Mediterranean countries, has integrated migration issues, and whether the European Neighborhood Policy, which gave new impetus to the Euro-Med partnership, incorporates, at bilateral and regional levels, the "Global Approach to Migration".

In its final part, the paper will offer some conclusions regarding EU labour immigration policy and both its potential and expected impact on Arab Mediterranean countries. Moreover, it will recommend some ways to reinvigorate present tools and will suggest new tracks for EU-Mediterranean policy developments. It will furthermore hint at policy options that could be used for the sound management of mismatches between labour supply and demand and for the elaboration of more balanced relations between the EU and the Arab Mediterranean in migration and labour policies.

1. EU migration policy - How have labour policy considerations emerged?

1.1 The general context

This section focuses mainly on the development of a common EU migration policy and shows how the recent EU labour policy framework emerged in the light of the Lisbon Agenda (2000).

The term "common European migration policy" is the outcome of a long period of development with three main phases: a significant lack of cooperation in migration-related issues at the European level gave way to informal, then formal intergovernmental cooperation culminating in the communitarisation of asylum and migration policy with the Treaty of Amsterdam in 1999.

Generally speaking, factors that have motivated EU member states to coordinate in the field of migration policy are related to the increase in challenges posed by mounting migration pressures,[117] labour-market demands, and the necessity of cooperation in the wake of increasing EU integration and enlargement drives. Since the inception of the EU, major efforts have been invested in ensuring the cohesiveness of European countries' legislative and policy frameworks with a view to harmonising migration policy areas and, consequently, to transferring state competences to the community level. The extent to which such harmonisation attempts have succeeded will be assessed at a later point in this section.

It is of capital importance to note in this regard that EU integration and the suppression of internal border controls have prompted an increasing need for a common migration policy and a common labour strategy to deal with external and internal pressures.

Although the Treaty of Rome establishing the European Economic Community in 1957 did not provide for any explicit policy in migration, it provided for freedom of movement for workers (article 48 and 49) and for the foundations of a common economic space (Kicinger and Saczuck: 2004, 9).

Another impetus for cooperation on migration policy within the EEC was the Single European Act in 1986 which set as a goal the establishment of a market without internal frontiers ensuring the free movement of capitals, goods, persons and services. Against the background of increased mobility, free movement and the suppression of internal border controls, closer coordination in migration among European states became imperative.

The Schengen Agreement concluded in 1985 (followed by the Schengen Implementing Convention in 1990) came into force in 1995. This Convention abolished controls at the EUs internal borders and provided for some additional measures related to visa issues, asylum and police. Although the

117 Notably the increase in irregular migration, the need to manage migration flows and mobility as well as the free flow of workers, human trafficking, and socio-economic costs of asylum.

Schengen Agreement refers to third-country nationals and to frontier crossings, it leaves more intricate issues related to residence permits and citizenship to national governments.[118]

1.2 The development of a labour migration strategy in the framework of the EU common migration policy (1992-2005)

A pivotal moment in the development of a common EU migration strategy was the signing of the Treaty of Maastricht in 1992. The latter established the right of EU citizens to move and reside freely in a common space. Its major breakthrough was that it integrated intergovernmental cooperation on immigration and asylum-related issues into the third pillar of the EU (Justice and Home Affairs). While this treaty enhances freedom of movement for EU citizens, it makes clear that third-country nationals are not to be beneficiaries of these developments and that issues related to immigration and asylum will be dealt within the third pillar.

At this stage, cooperation in migration-related issues remained intergovernmental as EU member states were disinclined to transfer national competences and decision-making to the community level.[119] It became clear though – despite this disinclination – that the elaboration of a common European migration policy was not achievable without the communitarisation of some national competences.

The Amsterdam Treaty, which came into force in 1999, marked the beginning of the era of communitarisation in EU migration, and provided the foundations for the current migration policy-making at the EU level.[120] Areas pertaining to immigration, asylum and to the free movement of persons were transferred from the third to the first EU pillar (community level). The main impetus underlying the treaty was that with the creation of an area without internal borders, there was an obvious need to devise common frameworks regulating external border crossings, asylum and immigration. From an analytical point of view, the Amsterdam Treaty laid the foundations for certain legal frameworks in the domain of legal migration and stated that employment is a matter of high salience. But the Treaty does not provide clear measures pertaining to labour migration,[121] nor to long-term border crossings.[122] In short, the legal foundations regulating labour migration remained rudimentary at this stage.

Considered as the cornerstone for a common European immigration and asylum system, the Special Tampere European Council (1999) adopted various policy orientations and priorities in the four realms: partnerships with countries of origin,[123] the development of a common EU asylum system, the fair treatment of third-country nationals, and the management of migration flows.

It should be noted that the EU was more concerned at this stage with consolidating the pillars for migration management with a view to creating “a genuine European area of justice”[124] than with focusing intently on a common labour strategy arising out of migration flows.

A common thread linking the development of the EU’s migration policy and a common labour market is the Lisbon Strategy, 2000.[125] Since this date, increasing attention has been given over to

118 It was only in the Dublin Convention (1990) signed as an intergovernmental agreement that The first foundations for further legislation concerning asylum claims within the EEC were established.

119 Thus, although the Maastricht Treaty started the process of harmonization among EU countries, diverse national legislative frameworks in the area of migration were still predominant.

120 The Treaty of Amsterdam foresaw a five-year transitional period (May 2004) in order to delegate power to the Community level in major migration matters.

121 See article 63, 3 (a) of the treaty available from

http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2006:321E:0001:0331:EN:pdf.

122 This is relevant to the movement of third-country economic migrants.

123 In the wake of the Tampere programme, regulations and partnerships making sure that migration becomes a main and overarching element in policy-making dialogue within the EU and between the EU and origin countries were put in place. We cite for instance, Regulation no. 491/2004 of the European Parliament and of the Council of 10 March 2004 which established a programme for financial and technical assistance to third countries in the realms of migration and asylum (AENEAS).

124 See Tampere European Council 15 and 16 October 1999, presidency conclusions available on http://www.europarl.europa.eu/summits/tam_en.htm.

relating integration policies to employment and labour, examining immigration in the context of demographic ageing and skill shortages, and devising policies that take legal migration channels to respond to labour needs into consideration.

Hence, in March 2000, the Lisbon European Council fixed full employment as a long-term objective to foster EU economic growth.[126] The Lisbon agenda is thought to have devised a new approach to the European social and economic agenda by confirming that jobs were a key element to sustainable EU development and economic competitiveness.[127] In this framework, it became evident that to maximize labour supply and reach these ambitious employment rate targets, the European Employment strategy[128] should take into consideration the labour and economic features of immigration, and that these features should be considered as a strategy that could encourage skills and mobility. In its Communication on a *Community Immigration Policy*, in 2000 the European Commission underlined that more attention should be given to the potential contributions of third-country nationals in the EU labour market and that "channels for legal immigration to the Union should now be made available for labour migrants."[129] The Communication called furthermore for the detection sytem for any labour shortages, in both skilled and unskilled domains, that might hinder EU competitiveness on a global scale, and called for a new look at the appropriateness of past immigration policies, and for the development of a coherent community immigration policy.

In December 2000, the Nice European Council, which launched the Social Agenda (2000-2006), stressed the issue of quality as a fundamental objective of European Employment Strategy, and called for more coherence across EU pillars and dialogue so as to address labour-market challenges. Moreover, in March 2002, the Barcelona European Council, which called for a reinforcement of the EU Employment Strategy, fixed objectives targeting the promotion of skills and mobility across the EU and called for the setting up of policies for full employment.

125 It is however worth keeping in mind that one impetus which has prompted the development of a common European migration policy was the establishment of the freedom of movement of labour which goes back to the Treaty of Rome in 1957. In fact, the need for a consistent labour migration strategy at an EU-wide level is one of the pivotal points which inspired the development of several legislative and policy-making measures so as to ensure and regulate labour force mobility. After the establishment of the European Union, priority was given to policy-co-ordination at the European level and to the necessity of developing national employment policies that match European interests. Since then, EU's socio-economic agenda has increasingly focused on the development of a community-based labour market.

126 Communication from the Commission to the Council and the European Parliament on a Community Immigration Policy, Brussels 22.11.2000, COM (2000) 757 final. For more information, see the Employment Guidelines for 2001, http://europa.eu/scadplus/leg/en/cha/c10240a.htm.

127 For an account on the Lisbon agenda, see Edward Bannerman, "The Barcelona European Council", Centre for European Reform, Policy Brief, http://www.cer.org.uk/pdf/pb_barcelona.pdf.

128 The Luxembourg European Council in November 1997 launched the European Employment Strategy (EES), also known as 'the Luxembourg process' whose aim is to reform the EU economic agenda and meet challenges posed by the labour market's needs and demands. The Lisbon strategy was a further step in this direction. The objectives fixed by this strategy revolve around full employment, quality of work and productivity.

129 Communication from the Commission to the Council and the European parliament on a community immigration policy, Brussels 22.11.200, COM (2000) 757 final, p. 3, available from http://www.statewatch.org/docbin/com/30.00757.pdf.

Although the EU Commission highlighted the necessity of linking EU competitiveness with labour migration and providing more rights to third-country nationals, this proposal – although duly acknowledged by the EU Council – did not result in immediate concrete action.[130] Another important point to highlight is that since decisions relating to migration were taken on a unanimity basis, controversial issues that did not enjoy full consensus were relegated.

The Seville Council in 2002 focused on fighting against irregular migration and stressed readmission, hence emphasising member states' preoccupations with migration governance and security issues rather than with economic immigration. The Conclusions of the Council aimed specifically at incorporating third countries as EU partners in migration management. Thus, the conclusions urged that EU cooperation with third countries include a clause entailing joint migration management, and readmission in the case of illegal migration.

However, the Thessaloniki European Council in 2003 tones down this approach. In addition to stressing the necessity of creating common frameworks on visa policies and documents of third-country nationals, the council focuses explicitly on integration policies, and argues that migrant integration leads to social cohesiveness and welfare.[131] Nevertheless, there is no emphasis on creating new legal migration channels, and focus is directed towards the integration of existing migrants.

On the other hand, more emphasis is laid – especially in the communications of the European Commission – on strengthening the link between labour migration and integration policies, whilst taking into account the EU's job and skill shortages: integration becomes "even more important and topical today as the economic and social aspects of demographic ageing become more significant". Hence, "access to the EU employment market for immigrants and refugees" now embodies "an essential component of the integration process."[132]

Another important development was the Green Paper adopted by the EC on an EU approach to managing economic migration which aims at convincing EU institutions, EU member states and civil society actors of the positive impact of recruiting third-country nationals.[133] The Hague Programme,[134] adopted in 2004 and active until 2010, further stresses the need to develop policies for the integration of legal migrants. Employment is specifically recognized as a key prerequisite for the integration of third-country nationals.

Assessing these developments we conclude that a milestone in the development of a common EU migration policy and associated labour considerations is the gradual – albeit precarious – linking of EU labour strategy with migration and integration policies. In the light of these attempts at reforming the EU economic agenda, it was inevitable that the link between immigration and employment needed to be enhanced and that reducing employment gaps in the EU meant devising immigration and integration policies tailoring EU needs. In order to increase and manage the freedom of movement of labour, more effort had to be made to ensure the existence of rights and facilities "by community law" (Vandamme: 2004, 441). This is why more sophisticated legislative instruments were devised in order to regulate labour movement and to give access to employment

130 In 2001, the Commission adopted a proposal for a Directive dealing with "the conditions of entry and residence of third-country nationals for the purpose of paid employment and self-employed economic activities". However, the directive has not been adopted.

131 The Communication on immigration, integration and employment consecrated the need for developing a common migration governance approach so as to address the needs of the European labour market. See for instance, Commission issues Communication on immigration, integration and employment, 2003,

http://www.eurofound.europa.eu/eiro/2003/07/inbrief/eu0307201n.htm.

132 Communication from the Commission to the Council, the European Parliament, the European Economic and Social Committee and the Committee of the Regions on immigration, integration and employment(COM/2003/0336 final), http://ec.europa.eu/justice_home/fsj/immigration/integration/fsj_immigration_integration_en.htm.

133 European Commission, Green Paper on an EU approach to managing economic migration, (COM (2004) 811 final, Brussels, 1.11. 2005.

134 The Hague Programme outlines 10 objectives for the European Union so as to strengthen the area of freedom, security and justice in the next five years. For more information, see "The Hague Programme: 10 priorities for the next five years" http://europa.eu/legislation_summaries/human_rights/fundamental_rights_within_european_union/l16002_en.htm.

in the framework of migration and integration.[135] The Directive providing for free movement of third-country nationals who have acquired long-term resident status (2003/109) is thought to be one of the instruments which have increased "the pressure on the EU to move towards a common position on economic migration" (Guild: 2007. 1).

Despite these developments, while progress is made on the integration of third-country migrants working within the EU, a structured labour-migration strategy targeting legal economic immigration and the first entry of third-country migrants for employment activities faced much resistance in the EU Council. Therefore, a more concrete approach on how the latter could benefit EU economic competitiveness remains underdeveloped. This was particularly evident in the following illustrative cases.

In July 2001, the Commission presented a proposal drafting conditions and rules of admission for the entry and residence of migrants for the purpose of paid employment and self-employment activities.[136] Nonetheless, the Commission had to withdraw this proposal in 2006.

The difficulty of adopting common legal positions with regard to labour migration among member states was particularly conspicuous in the Hague Programme (Carrera: 2007, 4). Indeed, the European Council made clear at this stage that labour immigration was a national competence and that adopting common legal positions with regard to labour migrants was still far-fetched. Also, in 2007, the Commission proposed the adoption of a common sanctions for employers recruiting third-country nationals without employment permission in 2007. Yet this proposal faced strident opposition and has not been adopted. 137

In sum, the European Commission's emphasis on developing a common labour migration framework has been at odds with the desire of EU member states to retain their prerogatives in this sphere and to resist a communitarian policy which would circumscribe or curb national decision-making. These inherent tensions at the EU level not only hindered the elaboration of a common EU labour strategy, but have indirectly got in the way of identifying and responding to labour-market needs in the Euro-Mediterranean region.

1.3 The interconnectedness between the Global Approach to Migration and economic immigration since 2005: an integrative or partial process?

Since 2005, the interconnectedness between establishing and regulating legal migration channels, a more holistic approach to migration, and a more coherent EU labour strategy with regard to economic immigration have all been stressed, especially by the European Commission which has actively promoted the "Europeanisation" and the "continuous reinvention of the European strategy" in the domain of regular migration (Carrera, 2007: 3).

On the one hand, more attention is paid to the need to regulate migration flows in order to fight irregular migration and address challenges linked to European demographic gaps and their repercussions on labour markets. For instance, in December 2005, the Commission issued a *Policy Plan on Legal Migration* which further set out the roadmap that the EU would embark on in order to concretise the Hague Programme.[138] The policy plan explicitly addresses policy features and

135 Legal instruments are devised to recognize rights such as access to employment and to education/training, and equality of treatment. See for instance council directive 2003/86 on the right to family reunification, council directive 2003/109 concerning the status of third-country nationals who are long-term residents and council directive 2004/83 on minimum standards for the qualifications and status of third country nationals. EU legislation on anti-discrimination also endorses this framework (directives 2000/43/EEC, directive 2000/78/EEC).

136 European Commission, "proposal for a Council Directive on the conditions of entry and residence for the purpose of paid employment and self-employment activities", COM (2001) 0386 final, Brussels,

http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2001:0386:FIN:EN:PDF.

137 "Proposal for a Directive of the European Parliament and of the Council providing for sanctions against employers of illegally staying third-country nationals " COM (2007) 249 final, Brussels,

http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52007PC0249:EN:NOT.

138 European Commission, Policy Plan on Legal Migration (2005)1680,

legislative measures related to economic migrants[139] such as the conditions of entry and residence of economic migrants. More specifically, it puts forward five legislative proposals on economic immigration and divides economic migrants into four categories: highly qualified workers, seasonal workers, remunerated trainees and intra-corporate transferees. It also encourages circular migration as a strategy that responds to "labour needs in Member States while contributing, through eventual return, to the development of countries of origin and offering skills and other gains to participating migrants."[140]

On the other hand, there is increasingly a sense that a common EU migration policy must encompass the needs of origin countries and should resort to new cooperative mechanisms which are founded more on a global than on a solely EU-based approach.[141] This is why the *Global Approach to Migration* in December 2005 highlights the need for a multilateral path as migration patterns have defied geographical and narrow institutional arrangements. The document draws attention to "how best to share information on legal migration and labour-market opportunities".[142] However, it is disputable on which grounds this approach is "global": in its geographic scope, or in the sense that it intends to take into consideration the interests of all parties or all the stages of the migration process, including the root causes of migration? If this is the case, and, however, enlightened this approach may be, concrete instruments that encompass these objectives are precariously defined and are at least partially missing. In the following paragraphs, the main shortcomings of the Global Approach as a framework that could provide an adequate platform for the Euro-Arab Mediterranean zone will be briefly outlined. This critical appraisal is very important inasmuch as it allows us to ascertain why this approach needs to be refined in helping manage labour and migration exigencies.

Upon analyzing the 2005 approach to migration which puts forward legislative proposals revolving around four categories of economic migrants (highly-qualified workers, seasonal workers, remunerated trainees and intra-corporate transferees), one is first inclined to inquire whether the Global Approach to Migration only partially addresses economic migrants' profile and flows, and whether it would really be able to lay the foundations for a holistic approach dealing with all economic emigrants, including those low and the medium-skilled who are not seasonal workers. It is clear that the inherent tensions at the EU level, and more precisely, the tensions between the EU Commission and the EU member states, partly explain and justify the incompleteness of the approach. Still, it is striking that the approach as it has been defined to date cannot provide a comprehensive mechanism that responds to all migration imperatives and realities in the Euro-Arab Mediterranean zone.

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http://eur-lex.europa.eu/LexUriServ/site/en/com/2005/com2005_0669en01.pdf.

139 This communication envisaged, for the period from 2007 to 2009, the adoption of four specific directives on labour immigration which tackle simplified admission procedures and conditions for certain categories of migrants: highly skilled migrants, seasonal migrants, remunerated trainees and intra-corporate transferees.

140 European Commission, "Policy Plan on Legal Migration" {SEC(2005)1680,

http://eur-lex.europa.eu/LexUriServ/site/en/com/2005/com2005_0669en01.pdf., p. 24.

141 This approach draws upon the importance of developing a global approach that would highlight cooperation among regions. See Antoine Pecoud and Paul de Guchteneire, "Introduction: the Migration without Borders Scenario," , p. 25 in Migration without Borders: Essays on the Free Movement of People, (UNESCO-Bergahn books).

142 See "Global Approach to Migration: Priority Actions Focusing on Africa and the Mediterranean", http://register.consilium.eu.int/pdf/en/05/st15/st15744.en05.pdf.

In a wider perspective, whilst studying the evolution of the EU common labour and migration strategy that culminated in the Global Approach to Migration, it must also be asked to what extent the origin countries' needs have been taken into consideration in drafting the major milestones of EU migration policy. In fact, though promising, the Global Approach is not presently endowed with sufficient components to remedy both policy gaps in the origin countries and *the root causes* of migration. It is important to recall here that the European Council, in its conclusions regarding a comprehensive European Migration policy in 2006, underscored the fact that: "the migration and development agenda will be intensified by increasing coherence between the Union's various policies, including their financial instruments, with a view to addressing the root causes of migration." [143] However, so far, no transversal approach providing the missing link between the EU and origin countries' labour needs and demands and taking into account the root causes of migration against the backdrop of EU-Arab Mediterranean countries economic cooperation has been sufficiently developed.

In the near future, more serious reflection should be given to asking how the Global Approach might not only mirror EU labour and migration needs, but also those of the origin countries and – on a deeper level – the root causes of migration at both ends. Moreover, consultative processes in the EU-Arab Mediterranean zone should identify how the Global Approach could be equipped with more powerful and specific instruments capable of respecting this double dynamic:

1. Address the totality of economic emigrants;
2. Devise a transversal problem-solving track which not only reflects a demand-driven approach to migration based on EU labour needs, but that is also based on the acknowledgement that a holistic approach to migration should integrate the needs and priorities of origin countries.

These reservations notwithstanding, it is important to draw attention to the promising potential of the "Global Approach to Migration" and to underscore the fact that since the re-launching of the Lisbon Strategy in 2005, major emphasis has been laid on revisiting the link between the management of legal migration channels, economic immigration and development.

Thus, the Employment Guidelines (2005-2008) adopted by the EU Council in the summer of 2005 accentuated the need to stimulate growth and employment as well as to reduce employment discrepancies for EU citizens as well as for third-country nationals. The Guidelines also specifically addressed labour-migration governance as key elements in filling in gaps lurking beneath labour-market needs in the EU (EER, 2008:43).

In December 2006, the Brussels European Council underlined the necessity of developing legal migration policies that line up with national priorities and that tackle future labour and development needs. Also, the High Level Conference on legal immigration which took place in Lisbon in September 2007 stressed the need to manage migration flows in the light of integration, economic competitiveness and development.

Whilst recognising that migration has become an established fact, more recent EC communications lay further emphasis on the link between migration-management and labour-migration orientations, in the context of a long-term and more global approach. As migration has become one of the key issues determining the EU agenda and EU labour-market needs, the understanding of the necessity for further convergence between EU member states and third countries in legal and labour migration developments is gaining momentum. Thus, in the Commission's Communication in 2007 *on the European Interest: Succeeding in the Age of Globalization* (European Commission, 2007), the following is stressed:[144]

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143 Presidency Conclusions of the Brussels European Council (December 2006), "A Comprehensive European Migration Policy".

144 Communication from the Commission to the European parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, " The European Interest: Succeeding in the Age of Globalization," , Brussels, 3.10.2007 COM(2007) 581 final, http://ec.europa.eu/commission_barroso/president/pdf/COM2007_581_en.pdf.

> "In a Europe with no internal borders, the changing demands of an ageing society and a labour market in constant evolution have challenged established assumptions about migration from outside the EU. A new global approach is needed so that migration strikes the right balance between the risk of labour market shortages, economic impacts, negative social consequences, integration policies and external policy objectives." [145]

The 2008 Communication on *A Common Immigration Policy for Europe: Principles, Actions and Tools* focuses on ten principles grouped under three main headings: prosperity, solidarity and security. The principles stress the importance of strengthening the relation between legal immigration and the socio-economic development in the EU, emphasizing solidarity among the member states and devising partnerships with the countries of origin and transit, and lastly, ensuring that the rules governing legal immigration are met and that illegal immigration is efficiently curbed.[146] The Communication specifically targets immigration in relation to "future labour and skill shortages" with a view to increasing "the EU's growth potential and prosperity".[147] It furthermore addresses the link between "the employment and social impact of migration of third-country nationals" in the framework of a common immigration policy, and stresses that "economic immigration in the EU will need to be assessed" by taking into consideration "the match between skills of the immigrants and national labour market needs".[148] Also, the importance of creating legal migration and integration channels for permanent and temporary migrants and of matching skills with labour market needs is underscored. More importantly, this document establishes that "the most important contribution of immigration to the EU economy and competitiveness will be to help, alongside and as an essential complement of the Lisbon Strategy for growth and jobs, to fill in arising and future labour and skill gaps on the EU labour markets."[149] Another important aspect is that labour migration in the Communication is considered as a typology of legal immigration to the EU, thus consolidating the link between managing legal flows of migration and labour considerations.[150]

Another important benchmark linking EU common migration policy to labour considerations is the "Pact on Immigration and Asylum" that the French Council Presidency proposed in 2008. [151] The pact suggests encouraging legal migration against a backdrop of employment and education, and stresses the importance of circular migration and knowledge and skill transfer as a fundamental EU labour strategy. To these ends, special emphasis is laid on the conclusion of "EU-level or bilateral agreements with the countries of origin and of transit containing, as appropriate, clauses on the opportunities for legal migration adapted to the labour market situation in the Member States…"[152]

145 http://ec.europa.eu/growthandjobs/pdf/COM2007_581_en.pdf, pp. 4-5.

146 Available from http://europa.eu/rapid/pressReleasesAction.do?reference=MEMO/08/402.

147 COM(2008) 359 final, "A Common Immigration Policy for Europe: Principles, actions and tools," Brussels, 17.6.2008, P. 3. http://eurlex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2008:0359:FIN:EN:PDF.

148 Idem, p.6.

149 See MEMO/08/402 Brussels, 17 June 2008, A Common Immigration Policy for Europe, 1-5, p. 5.

150 Idem, p. 5.

151 Amongst other important issues, this pact stresses the importance of organizing legal immigration in accordance with the priorities, needs and reception capacities of each EU member state, to encourage integration, to fight illegal immigration by making sure that irregular migrants go back to their country of origin or to a country of transit, to ensure a more effective border control management, and to devise partnerships with countries of origin and of transit so as to strengthen links between migration and development.

152 See the text of the European Pact on Immigration and Asylum available on http://www.euractiv.com/docad/pacteEN.doc, p. 13.

A major watershed in the EU strategy on economic immigration has been the new focus on highly-skilled migration. Highly-skilled migration has to do not only with the EU's needs for highly-skilled migrants, but also with the EC's attempt to address labour immigration in certain sectorial fields since previous proposals which targeted third-country immigrant labour [153] have not been received with enthusiasm.

In October 2007, re-emphasising the importance of fostering jobs and growth and the contribution of migration to EU economic competitiveness, the Commission's proposal for a Directive on a EU Blue Card[154] has underlined the importance of highly-qualified employment and the necessity of attracting highly-skilled migrants in the international competition for skills and talents.[155] The proposal, which is anchored in the Lisbon Strategy as well as in the broader framework of the EU strategy on economic immigration, adopts a "needs-based approach". Its objectives are not only to enhance the EU's economic competitiveness [156] and optimise the flexibility of labour markets, but to increase the positive impact of highly-skilled migration on developing countries.[157]

2. Instruments for implementing Global Approach

After having reviewed the policy developments in the EU's labour migration framework and elaborated on the nexus between the latter and the Global Approach to Migration, we will now look at some specific instruments designed to implement certain aspects of the Global Approach to see how and to what extent they are relevant to the Euro-Arab Mediterranean framework and to fostering a sustainable migration partnership between the EU and Arab Mediterranean countries (AMCs). This section will particularly address highly-skilled migration and the Blue Card as well as the circular migration schemes.

2.1 Highly-skilled migration and the Blue Card in the Euro-Arab Mediterranean context

This section will particularly address the Blue Card and its implications for Arab Mediterranean countries. For this purpose, it will first look at highly-skilled migration in Europe,[158] and its patterns, and will elaborate on the factors that attract highly-skilled employment to the EU. For this purpose, it will first examine the skill level of AMC migration in Europe, trends, locations and the reasons behind the successful attraction of highly-skilled migrants. Then this section will inquire into the possible match of the labour demand in the North and the labour supply in the South so as to understand if the idea of the Blue Card originates from a real need derived from both labour markets in the origin and host countries. Finally, it will describe the Blue Card's contents and its various characteristics in order to reach some conclusions as to whether the instrument is suitable and attractive enough to satisfy the need for highly-skilled migration to Europe and whether it will attract highly-skilled migration from AMCs.

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153 For instance, the Commission proposed the adoption of a common set up of sanctions against employers recruiting third-country nationals without employment permission in 2007. Yet this proposal faced strident objections. See Communication (2007) 247.

154 The EU blue card is a special work and residence permit that could be acquired by highly-skilled migrants in the EU.

155 The entry conditions are a work contract, a relevant travel document, sickness insurance, and for certain professions certain documents proving that the highly-skilled migrant meets legal prerequisites and qualifications.

156 See Memo 07/423, Brussels, 23 October 2007,

http://eur-lex.europa.eu/smartapi/cgi/sga_doc?smartapi!celexplus!prod!DocNumber&lg=en&type_doc=COMfinal&an_doc=2007&nu_doc=637.

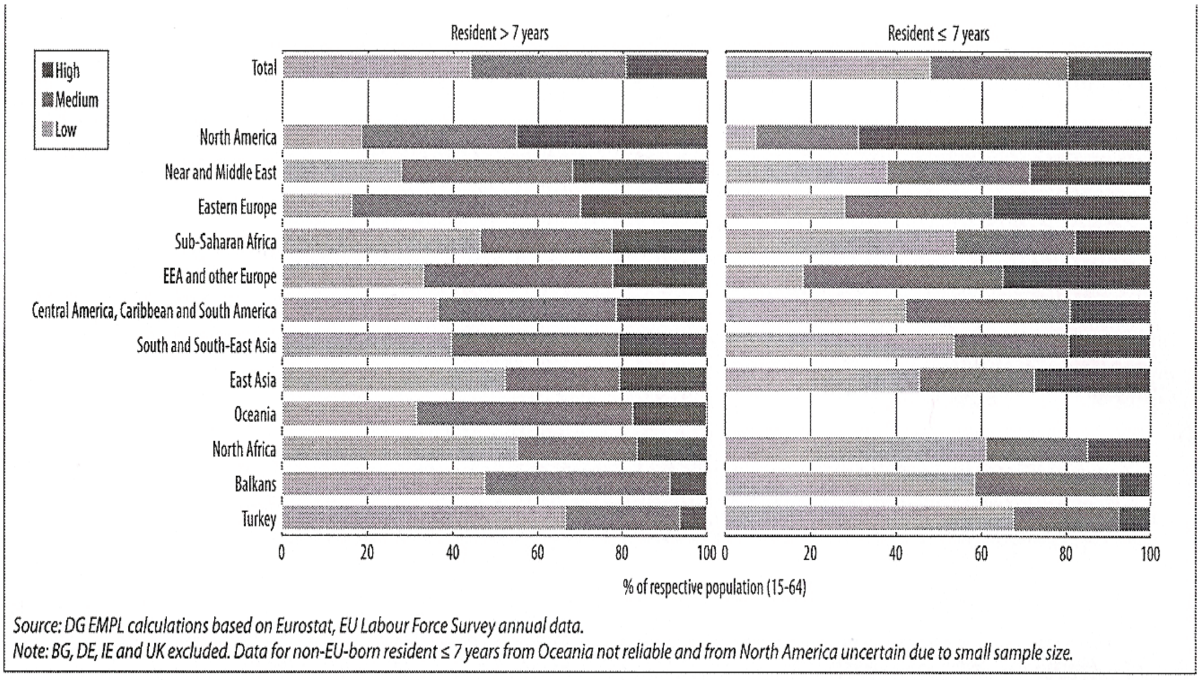
157 In order to avoid the negative effects of skill drain in origin countries, it proposes ethical recruitment procedures, limiting of active recruitment procedures in origin countries afflicted by brain drain, as well as encouraging circular, and thereby return migration.

158 It is important to clarify that "highly-skilled" not only refers to the level of education and competences but also to the "actually degree of profit that the immigrant will bring to the receiving state." (Carrera 2007, 2).

2.1.1 Skill level of migrants and their location

It is important at this stage to stress that the idea of the Blue Card is based on a real need derived from economic systems in both origin and host countries. Europe is made up of many different countries and different labour markets, but at the aggregate level the data presented by the European Employment Report 2008 stresses that third-country nationals and in particular immigrants from Arab Mediterranean countries for the most part hold unskilled positions. In the EU, 55% of third country migrants hold low-skilled positions, 30% have medium-skilled positions and fewer than 15% are in highly-skilled positions. Among AMC workers, while the percentage of the highly-skilled is lower, the share of the low-skilled becomes 60% (see Fig.1).

Figure 1: Skill level of non-EU born aged 15-64 by region of origin in the EU, 2007



Source: Employment in Europe 2008, p. 60

As Fig.1 shows, skilled migrants in Europe are mainly from North America (70% of recent immigrants are highly-skilled), and Eastern Europe (38% of recent Eastern Europeans immigrants are highly-skilled). Recent immigration from the AMCs has not improved the scenario. On the contrary, the "more recent" immigrants, those with less than seven years of residence in the destination countries, include a higher percentage of low-skilled migrants.

We can always question the accuracy of the data, that is whether the skill level should be measured by education level or by job type, but the message remains similar even if we change data source and look at education level (International Migration Outlook, SOPEMI, 2008, p.58). From a European point of view, whereas on average 25.3% of the immigrants in the OCDE countries hold tertiary education, in Europe only the United Kingdom (35%)[159] and recently Ireland (41%) with its economic development and its investments in high-tech industries, stand high among OECD countries. With these two exceptions, all other European countries range in between 24% (Sweden) and 11% (Austria) and this consequently implies a negative immigrants' qualification effect, namely a downgrading of total skill production (see Table 1). [160]

159 Considering its longstanding tradition of high-level education open to foreigners, and its internationally spoken language.

160 Norway has a high rate as well, but it has a large Nordic migration which is classified as extra-European.

Table 1 Percentage of immigrants with tertiary education and its impact, circa 2001

Country	Immigrants with tertiary education attainment%	Immigrant qualifications effect
Austria	11,3	-9,8
Italy	12,2	-14,1
Greece	15,3	-7,5
France	18,1	-1,2
Portugal	19,3	-5,8
Spain	21,8	-3,3
Switzerland	23,9	1,4
Sweden	24,1	-3,4
Australia	25,7	-5,7
United States	25,8	2,5
New Zealand	31,0	-3,2
United Kingdom	35,0	0,7
Canada	37,9	5,7
Ireland	41,0	6,0
All Countries	25,3	

Source: International Migration Outlook, SOPEMI 2008, p.58**.**

2.1.2 Where do skilled AMC migrants go?

Migrants from Arab Mediterranean countries follow two distinct patterns, with the Maghreb migrants going mainly to Europe and in particular to France and the Mashreq ones going mainly to Arab and non-European countries. Recent, more educated outflows are changing direction with an increase of emigration from the Maghreb countries toward other European countries and Canada and the US and also some Arab countries. This is the case of Algerian migrants[161] where UK (41%), US (53%) and Canada (61%) have the largest share of educated migrants. The same is true for Tunisian migrants who experienced an increase in the education of emigrants and emigration to Arab countries: the share of emigrants in Arab countries has increased from 12% in 2005 to 25% in 2008,[162] a similar pattern emerging with Morocco.[163] The Mashreq emigration to the Gulf has a long tradition. At least 80% of Egyptian migrants work in Arab countries where at least 40% hold highly-skilled jobs.[164] An interesting finding is that Egyptian migrants in the Gulf countries and in North America are more

161 National Background paper Algeria Bouklia-Hassan R., Talahite F. Also H. Khelfaoui (CARIM R.R.2006/4) shows how much more skilled are the Algerian immigrants in the USA and in Canada as well as the distribution of immigrants coming from the Middle East and North African (MENA) regions where the skill positions dominate over the unskilled positions.

162 National Background paper Tunisia, A.Mahjoub.

163 National Backgroung paper for Morocco, L.Jaidi.

164 National Background paper for Egypt J.Wahba.

skilled than Egyptian migrants to Europe, and 55% of highly-skilled Egyptians going to OCDE countries migrate to North America.[165]

The difference is striking too in the case of Lebanon. Thus, 46% of total migrants are in the US, Canada and Australia; 19% in Europe; 9% in other southern countries and 27% in the Gulf countries, and 45% of emigration from Lebanon is highly skilled.

In short, the main destination countries for skilled migrants from the AMC countries are the US, Canada and the Gulf countries.

2.1.3 Factors attracting foreign skilled migrants

Skilled migrant location is decided by the different job opportunities available to migrants in various labour markets and by the different channels of access to these opportunities.

The first factor in attracting foreign skilled migrants is language, which gives easier access to information, better selection and makes the immigrants' quality of life less strenuous. The United Kingdom and Ireland in Europe and the US, Canada and Australia hold an advantage here because skilled migrants – even if educated in the country of origin – are frequently fluent in English, which is the most widely-spoken language. But this is not always the case in AMCs, where French is also spoken.

The second factor is the educational system, which attracts foreign students and thus potential migrants. The United Kingdom, the US and Canada have a long tradition in higher-educational training, attracting not only third-country nationals, but also a large number of European students. France, similarly, attracts students from the former colonies.

The third factor is the result of the special economic and political ties which derive from historical relations frequently connecting two countries, as for instance those ties between Germany and Turkey. Such connections make it easier to find a job and reduce the cost of migration.

The aforementioned three ease the migration of educated labour, but the main driver of attraction is the skill-wage premium offered in the destination country, which pushes skilled migrants from many countries, including continental European ones, to choose the US, the UK etc, where wage dispersion is large and wage skill premium higher. Inside the OCDE countries skilled migrants workers tend to go where the higher and wider number of jobs are offered, where one of their languages is spoken and, if possible, to a society where it is easier to settle thanks to a long tradition of international communities. This creates a large supply in the US and the UK, channeled by selective migration policy**.**

A selective immigration policy is made by the quota system which selects migrants according to skill gaps and thus creates a process of virtuous immigration in the destination country. The lack of a selective immigration policy in continental Europe is only one, but not the main cause, of the prevalence of low- and medium-skilled migration. When for instance, in the 1990s, the German government tried to attract Indian engineers, the wage premium was not rewarding in comparison with competing offers available in countries where the cost of migrating was, in any case, lower given the previous immigration tradition.

So if the European Union want to attract more skilled migrants it has of course to start with a selective migration policy, a necessary though not a sufficient condition to bring about skilled inflows. Other instruments including student programmes, degree recognition and bilateral agreements will also have to be implemented if a higher-skill wage premium is impossible given the wage structure of the economy.[166]

165 Nassar ASN 2008/9, Table 6.

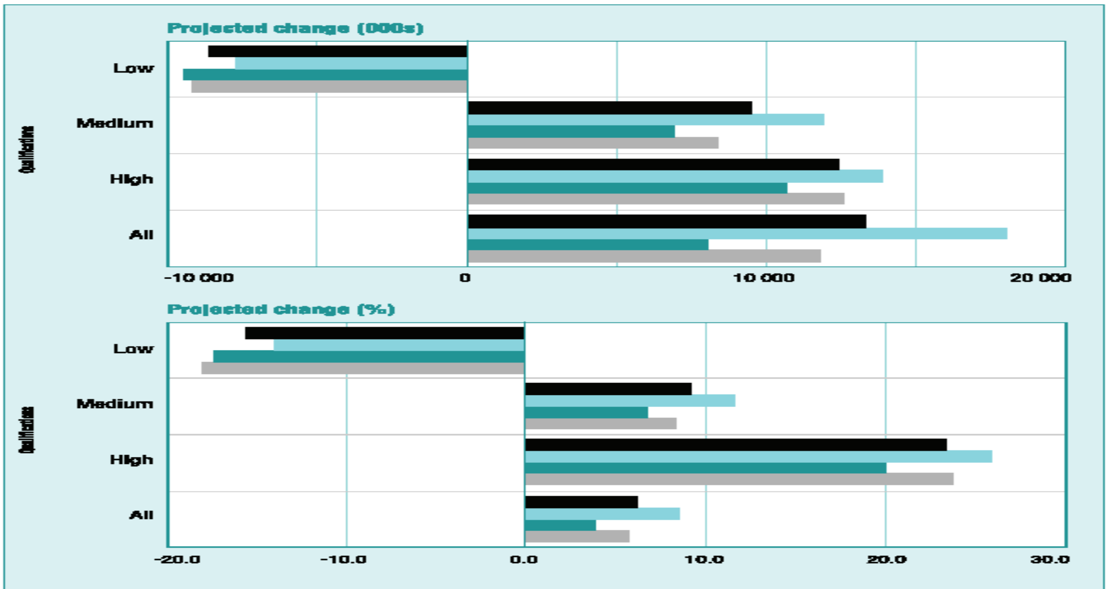
166 All this section draws upon the CARIM database and in particular table 1 of the CARIM annual report 2006/7.

2.1.4 Supply and demand match in the Mediterranean

In the future, Europe will undoubtedly need skilled labour. The CEDEFOP report (Future Skill Needs in Europe 2008), even if it was written before the current economic global recession, is relevant for understanding the long-term direction of European labour demand. Although the current deep recession will probably change national growth paths and will alter sector distribution and productivity, the main findings of the modeling will not be affected. Thus, in the course of the coming five years more skilled labour will be needed. Whichever scenario is considered, a decline in low-skill demand (-1.9%) will be compensated for by an increase in medium- (1%) and even more in highly-skilled labour demand (2.4%).[167] (See Figure 2).

Fig. 2 Scenarios compared: expansion demand by qualification, 2006-15, EU-25*

Source: CEDEFOP, Future Skill Needs in Europe, p. 63.



	All qualifications		High qualification		Medium qualification		Low qualification	
	000s	%	000s	%	000s	%	000s	%
LFS (Base)	11 735	[illegible]	12 559	23.7	8 237	8.4	-9 151	-17.9
Low 2	8 054	[illegible]	10 660	[illegible]	6 898	6.7	-9 503	-17.2
High 1	17 961	8.5	13 801	25.9	11 853	[illegible]	-7 892	-14.0
Base 0	13 280	6.3	12 408	23.3	9 461	9.2	-8 588	-15.8

Source: IER estimates based on Cambridge Econometrics E3ME model.

167 Data refers to table 7 page 60 of the report.

Table 2 Projected employment change by country and occupation, 2006-15 (000s)

Occupation major group	0	1	2	3	4	5	6	7	8	9	All
Belgium	-10	66	48	128	1	26	-11	-59	93	19	300
Czech Republic	1	-3	22	193	-7	2	-13	-136	171	-58	171
Denmark	0	20	88	86	-55	-24	-14	-26	-25	0	52
Germany	8	-83	518	325	-576	856	-144	135	-36	967	1 972
Estonia	1	-8	-1	-8	-1	15	-7	-25	3	7	-24
Greece	3	7	29	107	22	144	-96	-16	37	82	320
Spain	27	10	230	915	-160	538	-302	-233	-83	329	1 272
France	-37	333	317	455	-317	138	0	-181	-57	1 127	1 778
Ireland	-3	62	71	48	7	50	-5	11	-6	12	247
Italy	-5	571	358	1 262	239	250	-232	-773	-228	185	1 628
Cyprus	-1	3	13	16	17	-3	-3	4	2	35	84
Latvia	0	38	14	7	6	9	-30	-9	-17	-2	18
Lithuania	10	-25	74	10	-19	26	-64	27	0	23	61
Luxembourg	0	2	15	10	0	7	-1	-7	2	11	40
Hungary	-13	92	66	-11	28	36	-15	-104	54	42	175
Malta	1	4	-3	4	-2	4	0	2	-3	6	14
Netherlands	-11	-100	117	96	136	139	-28	-38	-22	312	602
Norway	-4	-40	62	114	-34	101	-34	3	-5	-11	153
Austria	0	26	64	186	-7	20	-32	-52	-51	133	287
Poland	1	183	586	137	97	-212	-624	361	88	59	676
Portugal	-9	45	197	4	34	15	-21	-78	69	63	319
Switzerland	0	62	222	80	-41	7	-39	-19	27	-1	299
Slovenia	0	19	58	40	-18	-5	-25	10	-13	8	73
Slovakia	5	10	26	31	-31	45	-2	-43	-6	-17	18
Finland	-2	120	23	45	-62	33	-30	-31	-28	-44	23
Sweden	-5	20	30	38	-45	69	4	-51	5	31	96
United Kingdom	-6	1 235	516	420	-484	238	61	-98	564	181	2 629
EU-25+	-51	2 671	3 762	4 739	-1 273	2 528	-1 707	-1 425	536	3 501	13 280
EU-25	-47	2 649	3 477	4 545	-1 198	2 419	-1 634	-1 410	514	3 512	12 828

Note: Total also includes armed forces.
Source: IER estimates based on Cambridge Econometrics E3ME model.

Occupation major group:
0 armed forces
1 legislators, senior officials and managers
2 professionals
3 technicians and associate professionals
4 clerks
5 service workers and shop and market sales workers
6 skilled agricultural and fishery workers
7 craft and related trades workers
8 plant and machine operators and assemblers
9 elementary occupations

Source: CEDEFOP, Future Skill Needs in Europe

This modeling considers both replacement demand[168] and the additional demand[169] which will take place in the economy. If the additional demand were more sensitive to the ongoing recession, the replacement demand which is mainly determined by exits from the labour market induced by retirement will constitute the larger component (80% of total demand) and, the highest-skilled position, (legislator and professionals) 61% (See Table 2).

So, the overarching inference is that if European countries want to remain competitive, given the high cost of labour, it is imperative that they turn towards more skilled production. This applies especially to southern European countries which still specialize in labour-intensive products, characterized by unskilled immigration and which do not risk the displacement of native workers in the labour market, but which rather risk, in the short term, being overtaken in the goods market by eastern and fast-growing emerging economies.

On the other hand, we note that AMCs, instead, produce skilled labour and that an excess supply of educated workers is noticeable. In Egypt for instance the labour force participation rate has a V shape with the highest participation rate among the illiterate and the university-educated both in urban and rural areas (Assaad, 2007). The young male (15-29) unemployment rate is however increasing with the level of education (Amer 2007), and is frictional for the level below middle school and increases for general secondary, technical secondary, post secondary institute and university (and above) where it reaches 25% of the total labour force. What is even more important is that, in the last 20 years, it has increased from 15% to 25% with the increase in the investment in education.

The lower unemployment rate of the less educated is usually explained by the lower reservation wage of the low skilled who accept any job offered to them. In this case the decrease in the unemployment rate of illiterates, and the increase in the unemployment rate of the more educated is

168 The demand for new workers induced by age exit.

169 The demand for new jobs.

the result of a mismatch between labour supply and national labour demand, which affects all educational levels above the middle school and which also touches technical education and post secondary education and university education. It is important to stress that high unemployment among university students is frequently explained by the lack of integration between the direct need of the labour market and the general increase in human capital. The higher unemployment rate among the highly educated is common to all AMCs (see summary Table 3.3.1 of the Final Report of the Study) and in Morocco, Tunisia and Algeria is a very recent phenomenon. Not all the educated unemployed are ready to emigrate, and not all those women who are unemployed are ready for a big move: many of them, as in Egypt, are in search of a job in the public sector, while, instead, in Lebanon the wage premium abroad pushes both men and women, both unemployed and employed towards migration.

In Europe, there is already an excess demand for skilled labour that is not satisfied by the domestic supply and satisfied only partially by the labour supply coming from Eastern European countries. In the not so near future labour supply from the new accession countries will not be available for migration anymore, and, as could have been predicted before the recent recession, there will be open demand for high and medium-skilled migrant labour. The Arab Mediterranean countries can thereby be the appropriate pool for recruiting foreign-skilled labour because there is an explicit labour supply and, at the moment, a lack of adequate demand for educated workers.

If the quantity demanded seems to match the quantity supplied, the second problem is the question of whether the quality of the human capital produced in AMCs is the type of quality needed in Europe. A wide-spread complaint in AMCs is that the increase in education has been obtained through a reduction in the quality of the educated, which could also explain high unemployment there.[170]

But one of the weaknesses of the educational systems in the MENA region is the type of specialization among the highly-skilled which is overly concentrated in the humanities and social sciences (76.2% of the university students are in the humanities and social sciences in Egypt, 75% in Morocco, 60% in Lebanon, 57.4% in Syria, 56% in Algeria, 50% in Tunisia)[171] with too little attention devoted to vocational training. According to G. Corm (2009)[172] in the MENA region the total share of student who went through vocational training in 1999 was only 20%, while, for instance, in Turkey the corresponding number was 47%. This is an important point to recall in matching supply on one side of the Mediterranean and demand on the other.

Table 2 presents an accurate analysis of likely demand by profession as it could arise in each European country and the modeling of the CEDEFOP research also specifies the demand by sector and skill level. If it is difficult to make forecasts because of the present economic crisis and the near impossibility of measuring its course, it is possible to say that, if in the short run total demand declines and the economy settles on a less-skilled growth path, this effect will be temporary, and the CEDEFOP forecast will only be postponed for, at most, two years. These remain then important pointers for future tendencies.

Given demand on the one side and supply on the other the policy approach will not be to train workers for emigration, applying the Filipino model, but to use some trained workers in the origin countries for (temporary or more permanent) positions in the European labour market. The excess supply of skills (unemployment) is very large thus brain drain is not typically a danger.

The economic moment seems also propitious for Europe to attract skilled migrants. After all, North American labour markets, in particular the US's, are seeing workers laid off at all levels, and open demand for skilled migrant has already declined there. Then too, the economies of the Gulf countries – while not all seeing the same rapid fall off in production – is postponing investments and reducing growth plans and therefore reducing open demand for foreign labour. European states

170 National background paper Egypt, J.Wahba, 2009.

171 World Bank 2009, "Shaping the Future", p.44.

172 See "Labor Migration in the Middle East and North Africa, A View from the Region", back ground report for the WB Report "Shaping the Future" p.29.

are hardly in a better position. But their labour markets are less flexible. Thus the queues of unemployed are not as long and some sectors are still growing: comestibles, for example. Hence, labour demand in Europe is falling at a slower pace. If Eastern European countries recover more quickly from the recession there will then be open demand for additional skilled workers.

After analyzing the trends and the dynamics of highly-skilled migration in the Euro-Arab Mediterranean context, it is important to look at the Blue Card and determine whether it could provide a solid instrument to satisfy the need for highly-skilled migration in the EU and the demand for labour stemming from Arab Mediterranean countries.

2.1.5 The Blue Card: is it attractive enough to satisfy the need for highly-skilled immigration in the Euro-Arab Mediterranean context?

The EU Blue Card directive was adopted by the Council in May 2009 as part of a plan for defining and facilitating "the conditions of entry and residence of third-country nationals for the purposes of highly qualified employment".[173] It is important to keep in mind that the Directive is in line with the Lisbon Strategy objectives that aims at addressing skill shortages and the labour needs of EU member states with a view to making the EU labour market more competitive and fostering economic growth. Hence it has to be interpreted as a logical extension, as well as a major component of the EU economic migration strategy.

The Directive lays the foundations for admission for highly-skilled migrants, the issuance and withdrawal of the Blue Card, highly-skilled migrants' economic and social rights and, finally, their residence in EU member states. For the sake of clarity, it defines the EU Blue Card as "the authorisation bearing the term 'EU Blue Card' entitling its holder to reside and work in the territory of a Member State under the terms of this Directive".[174]

The EU Blue card is valid for a period of one to four years, with the possibility of renewal, and it is contingent upon the following five admission conditions: a "valid work contract" or a "binding job offer" of at least one year in one EU member state; the presentation of a "document attesting fulfillment of the conditions set out under national law for the exercise by Union citizens of the regulated profession"; the presentation of a valid travel document or an application for a visa; the presentation of evidence of an application for health insurance; and for the issuer to be satisfied that the applicant does not "pose a threat to public policy, public security or public health".[175]

Furthermore, the card grants the EU Blue Card holder equal social and economic rights as nationals in various areas, namely working conditions, freedom of association; education, training and recognition of qualifications; a number of provisions in national law regarding social security and pensions; access to goods and services, including procedures for obtaining housing, information and counseling services; and free access to the entire territory of the member state concerned within the limits provided for by national law.[176] It also recognizes that "favourable conditions for family reunification and for access to work for spouses should be a fundamental element". [177] Moreover, it makes sure that "the gross annual salary {…} shall not be inferior to a relevant salary threshold […}, at least 1,5 times the average gross annual salary" in the concerned EU member state.

It is important to stress that the Blue Card has various advantages. Thus, it provides for a mininum level of legal and policy harmonisation among EU member states regarding highly-qualified employment. It also creates the mechansims for a fast-track procedure enabling highly-skilled migrants to take up highly-skilled employment. Moreover, it bestows favourable rights to highly-skilled migrants in terms of mobility inside the EU, equal treatment with nationals regarding social

173 See Council Directive 2009/50/EC of 25 May 2009, on the conditions of entry and residence of third-country nationals for the purposes of highly-qualified employment.

174 See Article 2 entitled "Definitions, paragraph (c) in the directive under Chapter I.

175 See Chapter II, Article 5 in the Directive.

176 See Article 14 entitled "equal treatment" under Chapter IV.

177 See Preamble Article 23.

assistance, tax benefits and recognition of diplomas, and access to the labour market. Finally, it envisages more flexible procedures allowing family reunification and work access for spouses. It is important to add that it establishes “implementing measures” and reporting obligations; hence suggesting that the policy instrument is to be assessed and monitored[178].

However, the Blue Card as an instrument for the promotion of highly-skilled migration has inherent weaknesses that we will not dwell upon extensively. It must suffice here to mention the following concerns:

- The Blue Card project is conditional upon a contract or work offer and does not provide a right of first entry for a highly-skilled migrant (Guild: 2007, 4). This suggests that the EU has failed to reach a minimal consensus and a level of harmonisation on the conditions for first entry and the residence of economic migrants who come for the purpose of employment or self-employment;
- Although it bestows upon its holder various economic and mobility rights, it also presupposes various restrictive prerequisites that limit its attractiveness. For instance, in the case that temporary unemployment should occur for a period exceeding three consecutive months or if it occurs more than once, the EU Blue Card is withdrawn;[179]
- The fact that it gives more privileges in terms of family reunification to the highly-skilled migrants who have not lived in the EU, as opposed to third-country nationals who are established residents of the EU is controversial;
- More importantly, it is not clear whether and how the Blue Card is an instrument that excludes or paves the way for an EU citizenship and if the Blue Card is to be understood in this way, how do divergent citizenship laws in EU member states and the Blue Card complement each other?
- Although it explicitly targets the necessity of avoiding brain drain and of establishing ethical recruitment procedures so as to “minimise negative and maximise positive impacts of highly skilled immigration on developing countries in order to turn ‘brain drain’ into ‘brain gain’”,[180] concerns have been raised about whether the Blue Card could negatively impact on origin countries as no sufficient empirical work has been done on the effects of brain drain and how the latter occurs;
- From a broader angle, the Blue Card raises the question of whether future migration trends in EU labour immigration would be more focused on highly-skilled and selective migration. In this regard, analysing the Blue Card as an instrument for the implementation of the Global Approach to Migration casts doubt on the *Globality* of the Approach itself. This is why it has been argued that Europe needs instead “a common policy for all types of labour migration, be it unskilled, semi-skilled or highly-skilled” (Baldwin-Edwards, 2009, 135) and not partial instruments addressing specific migration aspects;
- Despite the fact that the EU Blue Card Proposal has been adopted as Council directive, the UK, Denmark and Ireland did not adhere to the proposed approach. Moreover, the UK has already a quite efficient system of skilled labour recruitment. This not only draws attention to the lack of coordination and difficulties relating to shaping a common European labour migration policy, but also casts some doubt upon the credibility of the EU Blue Card as a policy instrument capable of pooling all EU actors together.

2.2 Seasonal work, temporary and circular migration

The second feature promoted by the Global Migration Approach is the idea of “temporariness” and “circularity” in migration. This section will examine the added value of circular and temporary

178 See Chapter VI or Final Provisions of the Directive.

179 See Chapter IV, Article 13 of the Directive.

180 See Preamble Article (22) of the Directive.

migration schemes in the framework of the Global Migration Approach and more specifically in the EU-Arab Mediterranean framework.

2.2.1 Trends and dynamics of temporary movements

According to the OCDE definition, "temporary migrants" covers many conditions: seasonal workers, trainees, international students, exchange visitors, researchers, artists, tourists, service providers, installers etc. It is very difficult then to compare data because single cases are classified in different ways in each country. The data provided by the OCDE on this issue is thereby incomplete for the reason mentioned above.

Data collected shows, however, the sheer scale of temporary movements, which are 3 times larger than permanent migration. It is important to note that seasonal workers represent 23% of all temporary flows. Seasonal migration features in agriculture, but also in the tourist sector. The demand for seasonal workers is, in general, larger than the number of visas granted by the government. Thus temporary jobs are usually done by holders of a student or tourist visa (in Table 3 they are termed "working holiday makers"). In addition, when well-organized yearly jobs can be done in shifts and so shared between two or more workers.

The idea of expanding seasonal migration opportunities both for skilled and unskilled workers is in line with the circular vision of migration. However, supply and demand in this field needs more coordination if irregular employment is to be avoided and demand anticipated.

The idea put forward by the Commission to favour circular migration begins with the devising of an institutional framework. Institutions should thus change so as to favour this type of movement, which have, to date, been constrained by restrictive migration legislation in destination countries. The history of European migration has shown that if migrants are free to exit and re-enter they tend to maintain a strong attachment with the country of origin and keep to a model of circular migration whereby migration is not perceived as permanent. The changed institutional setting which took place in Northern Europe in 1973 after the beginning of the recession transformed temporary migration to Germany, France and Belgium into permanent migration precisely because of the changes in migration policies. The reduction in the number of new entry permits granted by host countries reduced first of all the number of exits and pushed immigrants to settle and to become more integrated in the destination countries (the number of demands for citizenship increased)[181].

If regulations shape the duration and the type of migration, a change in regulation versus a more flexible pattern should increase the number of temporary migrants staying abroad. Seasonal migration is just one of the many types of temporary migration. Also, contracted migrations, which could be designed so as to meet the workers' needs, are another form used by companies for special projects.

Nevertheless, it must be stated that temporary migration cannot be the only solution for the supply pressure of the AMCs. As Venturini (2008) has shown, the migratory potential due to excess supply is too large to be solved by repeated migrations. With the use of a stock-flow model, we can calculate the flow excess supply as the difference between the low supply and flow demand (as replacement flow demand and as additional flow demand) and even the absolute excess flow supply which takes into account the usual traditional (permanent) annual emigration outflows. What is left, the absolute excess supply in term of flows is too large to be solved only through repeated emigration as Table 4 shows. This would, for example, mean that each year in Morocco 126,000 and in Egypt 72,000 workers would leave temporarily, and if economic conditions remain the same, the following year the same people would leave temporarily for a second year abroad and the new entrants for the first time with a total of 252,000 for Morocco and 144,000 for Egypt and so on.

181 See Venturini 2004, section 5.

Table 3 Inflows of temporary labour migrants, selected OECD countries, 2003-2006

Thousands					
	2003	**2004**	**2005**	**2006**	**Distribution (2006)**
Working holiday makers	442	463	497	536	21
Trainees	146	147	161	182	7
Seasonal workers	545	568	571	576	23
Intra-company transfers	89	89	87	99	4
Other temporary workers	958	1,093	1,085	1,105	44
All categories	2,180	2,360	2,401	2,498	100
					Per 1 000 population (2006)
Australia	152	159	183	219	10,7
Austria	30	27	15	4	0,5
Belgium	2	31	33	42	4,0
Bulgaria	-	1	1	1	0,1
Canada	118	124	133	146	4,5
Denmark	5	5	5	6	1,1
France	26	26	27	28	0,5
Germany	446	440	415	379	4,6
Italy	69	70	85	98	1,7
Japan	217	231	202	164	1,3
Korea	75	65	73	86	1,8
Mexico	45	42	46	40	0,4
Netherlands	43	52	56	83	5,1
New Zealand	65	70	78	87	21,1
Norway	21	28	22	38	8,2
Portugal	3	13	8	7	0,7
Sweden	8	9	7	7	0,8
Switzerland	142	116	104	117	15,7
United Kingdom	137	239	275	266	4,4
United States	577	612	635	678	2,3
All countries	2,180	2,360	2,401	2,498	2,6
Annual change (%)	na	8,3	1,7	4,0	

Statlink http://dx.doi.org/10.1787/427045515037

Source: OECD database on International Migration

Table 4 Absolute excess supply

Source: Venturini, 2008.

Annual Labour Market Flows								
		1	2	3	4=2+3	5=1-4	6	7=5-6
	Year	Supply Inflow into employment	Exit flow from employment	Additional demand	Total Flow Demand	Internal Excess Supply	Emigration out.flows	Absolute Excess Supply
Tunisia	2005	113,000	35,000	48,000	83,000	30,000	4113/9,000	26,000/21,000
Morocco	2006	310,000	92,000	30,000	122,000	188,000	60,000	128,000
Egypt	2006	938,000	150,000	624,000	774,000	164,000	92,811	72,000
Algeria	2005	357,000	37,000	12,000	49,000	308,000	42,000	266,000
Turkey	2006	837,000	240,000	130,000/ 430,000	370,000/ 670,000	597,000	51,590	400,000 or100,000

**Population data, Labour force data, Exit data: ILO statistics.
Additional demand CARIM data Istanbul Conference
Migration data CARIM Report 2006-7**

2.2.2 Policy changes

Still, even if the temporary migration programmes do not solve the demand for income and jobs among potential migrants, some changes have to occur in the near future so as to improve this option, making it more beneficial and more appealing. The main weaknesses of all forms of temporary migration programmes lie in the fact that they are not designed to grant any old-age pension to the worker. All contributions (social charges) paid by the employer and the employees are lost because migrants do not reach the minimum period, which in general in Europe is 15 years, namely the minimum number of years of contribution necessary to receive a pension in the host country.

If the minimum vesting period is important for determining a minimum pension level necessary to live in the host country, it reduces the incentive for those types of contracts which grant an annual income in the country of origin for a short period in a host country. To transform temporary migration into a long-lasting form of migration, a revision of the payment and cash of the social contribution paid by the migrants and the firm should be made into a personal social account attached to the migrant that he/she can fill whilst working in different periods and maybe also in different countries. The portability regulation that allows migrants to receive their pension in the country of origin has to be integrated with special treatment for temporary workers which allows a reduction of the vesting period and an obligation to cash the pension in the sending country.

Furthermore, easier visa policies have to be devised in order to facilitate the mobility of temporary migrations so that agencies are encouraged to favour this option.

Special attention could be devoted to students and to trainees. Participation in the educational system of the host country varies a lot. Table 5 shows how the participation of foreign students differs in the host educational system. Thus, this varies from 2% in Italy to 18% in Switzerland, with even larger variations if advanced research programmes are considered: 40% in the UK and 3.4 % in Italy. As part of a future employment strategy, the presence of foreign student has also to be enhanced because it is a prerequisite for cooperation between workers of different origins and better future social integration.

Table 5: Table International and/or foreign students in OECD Countries, 2000 and 2005

	International Students	Foreign Students	Number of Students 2005	
	As a percentage of all tertiary enrolment	As a percentage of all tertiary enrolment	Foreign Students	International Students
	Total tertiary	Total tertiary		
OECD Countries				
Australia	17.3	20.6	211 300	177000
Austria	11.0	14.1	34500	27000
France	10.8	n.a.	226500	236500
Germany	n.a.	11.5	259800	204600
Ireland	6.9	n.a.	12900	12900
Italy	n.a.	2.2	44900	n.a.
New Zealand	17.0	29.9	69400	40900
Spain	1.0	2.5	45600	17700
Sweden	4.4	9.2	39300	19900
United Kingdom	13.9	17.3	394600	318400
United States	3.4	n.a.	590200	590200
OECD Total	**6.7**	**7.8**	**2318401**	**1982701**
OECD Total for common countries			**1339301**	**1032101**

n.a. : means not available.
1. International students are defined on the basis of their country of residence.
2. International students are defined on the basis of their country of prior education.
3. Percentage in total tertiary underestimated because of the exclusion of certain programmes.
4. Excludes private institutions.
Source: education at a glance, OECD 2007. See www.oecd.org/edu/eag2007

2.3 Integration policies of permanent migrants

An additional and fundamental component of the EU Global Approach to Migration revolves around integration policies. After having taken into consideration economic integration, we notice obvious discrepancies between the migrant and the native worker who have similar characteristics in terms of wage compensation and job options.

A survey of wage assimilation results for Europe (Venturini, 2009) shows an open under-assimilation in southern and in northern European countries. Although the findings of research papers are various, we can group the causes of under-assimilation into several causal groups: insufficient human capital,[182] limited knowledge of the language of the destination country,[183] the economic cycle at entrance,[184] negative selectivity upon return,[185] and the existence of national differences.[186]

182 If the human capital is not adequate, migrants integrate in the labour market at a lower level than natives (for instance in France Granier Marciano 1975) and the increase of their wage during their working life is lower. Frequently, only the human capital acquired in the country of destination has a positive effect (in Denmark Neilson, Rosholm, Smith 2000; in the Netherlands Kee 1994).

183 For linguistic proficiency see in UK, Chiswick 1991, Dustmamm Fabbri 2003 favouring the economic upgrading.

184 Migrants who enter destination countries in periods of recession (negative cycle) as wage carrier have limited prospects (in Canada: Bloom, Grenier, Gunderson 1995, in Sweden:Bevelander and Scott, 1996) or as changes in the types of jobs available take place (technological change) requiring more linguistic skills with regards to available jobs mainly in the service sector (see for instance in Sweden and Denmark: Rosholm, Scott and Husted,2000).

The causes of under-assimilation are, however, not easy to tackle. Integration policies in the host country such as language courses and training courses have had a very limited effect. Probably more binding programmes have to be envisaged such as linguistic tests for a permanent residency permit and training courses. The selection of migrants will reduce cases of under-assimilation and remains one of the few options available in this field. But as under-economic assimilation frequently means under-social assimilation, the selection of migrants does not insure against social exclusion, which is affected by income level and by the education level of workers.

It is important to stress that policies used to reduce the number of under-assimilated foreigners, and the incentive return policies for the unemployed have already shown their inefficiency as unemployed migrants do not go back home. If host countries are keen on revising their migration policies so as to reduce the number of permanent migrants but not the number of workers, a solution is to combine more temporary migration schemes which insure a return on human capital to the origin country with more efficient integration policies optimising the long-term migrant's integration in the host country.

After having studied how and to what extent highly-skilled migration, temporary circular-migration schemes, and integration policies could empower the promoted Global Approach to Migration in the Euro-Arab Mediterranean Framework, we will now look more closely at the Euro-Mediterranean framework and the European Neighborhood Policy, and evaluate whether they are adequate instruments capable of refining the Global Approach to Migration and the EU's external migration policy at both bilateral and regional levels in the Euro-Arab Mediterranean migratory and economic space.

3. The Euro-Mediterranean framework and the European Neighborhood Policy: Adequate tools for an external migration policy?

The need for "a comprehensive approach to migration addressing political, human rights and development issues in countries and regions of origin and transit" was already stressed in the Tampere European Council's conclusions (1999). Thus, the latter emphasizes that "this requires combating poverty, improving living conditions and job opportunities, preventing conflicts and consolidating democratic states and ensuring respect for human rights, in particular rights of minorities, women and children". In many respects, those general objectives, considered as causes of undesirable immigration to the EU, match the Euro-Mediterranean Partnership's (EMP) declared aims.

However, paradoxically, the consideration of migration issues both in the Barcelona Declaration and in the Euro-Mediterranean Association Agreements (EMAAs) between the EU and Mediterranean Partner Countries was quite limited, except in the field of non-discrimination with regard to legally residing migrant workers (see Appendix). Whereas, in the most recent EMAAs, cooperation in the field of illegal migration is stressed (this is particularly clear in the EMAA with Algeria), migration remains part of a social dialogue to be held between partners with no particular incentives, and not of the economic cooperation. Only in the last few years, after the Summit marking the first ten years of the Euro-Mediterranean Partnership (1995-2005), have migration issues come to the fore in Euro-Mediterranean co-operation, with a new pillar of cooperation in Justice and Home Affairs.

The European Neighbourhood Policy launched in 2003 raised new expectations in the Euro-Mediterranean context, as a result of which new cooperation methods and funds have been made

185 It means that the more talented go back and the less qualified remain. Migration literature has usually assumed that migrants are positively selected, namely that the best move. Still this does not necessarily mean that the more educated move. For a given level of observable characteristics, the unobservable variables which positively effect the wage equation affects positively too the probability of leaving. This is the case in Italy and Germany (Venturini Villosio 2008, Massey Constance 2003) and is one of the explanation of the lower assimilation.

186 Even after controlling for language, human capital, years since migration and the economic cycle a national fixed effect remain which probably leads back to the social capital of the migrants or to a form of discrimination – be that discrimination open or otherwise.

available. In the following section, we will assess to what extent the present conjunction of EMP (as multilateral track) and ENP (as a bilateral scheme) incorporates the Global Approach to Migration's objectives in a more systematic way than in the previous EMP era, and could thereby pave the way for a more proactive cooperation in the Euro-Arab Mediterranean space.

3.1 The Barcelona Process (1995-2005)

Launched in 1995, the Barcelona Process provided for an institutional framework for multilateral cooperation between the EU and its Mediterranean neighbours with a view to creating a common space of "prosperity, stability and security". Through the Barcelona Declaration, partners proclaimed their commitment to a free-market economy and to democratic governance around the Mediterranean basin. The objective aiming at the establishment of a zone of peace, prosperity and stability in the Mediterranean region without any prospect of formal EU membership was emphasised. In order to meet those far reaching objectives, the Euro-Mediterranean Partnership was implemented through a limited number of regional programmes and through the Association Agreements concluded between the EU and each of the Mediterranean Partner Countries involved in the Barcelona Process (among them, Tunisia, Morocco, Algeria, Egypt, Palestine Lebanon and Jordan). [187] In the Barcelona Declaration establishing the Euro-Mediterranean Partnership, migration was only mentioned in the chapter on the "Partnership in Social, Cultural and Human Affairs" [188] in the following terms:

> "They acknowledge the importance of the role played by migration in their relationships. They agree to strengthen their cooperation to reduce migratory pressures, among other things through vocational training programmes and programmes of assistance for job creation. They undertake to guarantee protection of all the rights recognized under existing legislation of migrants legally resident in their respective territories.
>
> In the area of illegal immigration the decide to establish closer cooperation. In this context, the partners, aware of their responsibility for readmission, agree to adopt the relevant provisions and measures, by means of bilateral means or arrangements, in order to readmit their nationals who are in an illegal situation".

3.1.1 The Euro-Med Partnership's objectives

Each of the Euro-Mediterranean Association agreements concluded in the framework of Euro-Mediterranean Partnership relies on three pillars: political cooperation and security, economic and financial cooperation, and cooperation in the field of human and social affairs and culture. According to the EMAA's aims, a free-trade area between partners should be established over a transitional period of twelve years. This economic "negative"[189] integration process would imply free trade in industrial goods and the progressive liberalisation of trade in agricultural products as well as the future liberalisation of trade and services.

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187 We note that until now no EU-Syria Association Agreement has come into force.

188 According to the Barcelona Declaration, the partners agreed to establish a partnership in social, cultural and human affairs with a view to bringing peoples closer together, promoting understanding between them and improving their perception of each other. This partnership is based on the delicate compromise between, on the one hand, the existence, recognition and mutual respect of diverse traditions, cultures and civilisations throughout the Mediterranean and, on the other hand, the promotion of common roots: to this end, the Barcelona Declaration and its work programme emphasise: the importance of intercultural dialogue, and of dialogues between religions; the importance of the role the media can play in the reciprocal recognition and understanding of cultures; the development of human resources in the area of culture: cultural exchanges, knowledge of other languages, implementation of educational and cultural programs that respect cultural identities; the importance of health and social development and respect for fundamental social rights; the essential contribution civil society can make to the Euro-Mediterranean partnership and the need to strengthen the instruments of decentralized cooperation to encourage exchanges between those active in development; cooperation in the field of illegal immigration, the fight against terrorism, drug trafficking, international crime and corruption.

189 Negative because it implies removal of trade obstacles.

This process is expected to be complemented by political, economic, social and cultural cooperation. The EMAA with Algeria, which was the latest to be signed,[190] also includes a chapter on cooperation in the field of Justice and Home Affairs.

Upon reading the main objectives pursued by the Association Agreements,[191] it is clear that migration or human mobility was not the principal focus of the Partnership at the time the EMAAs were drafted.[192] The EC-Algeria Association Agreement is a noticeable exception in this respect because article 1§2 among other objectives includes the "facilitation of human exchanges, particularly in the context of administrative procedures". Here visa and admission procedures are targeted (see article 83 of the EC/Algeria AA).

Notwithstanding these remarks, "The EMP is centred on the Economic and Financial Partnership and on the expected positive effects of the establishment of the Euro-Mediterranean Free trade Area (EMFTA)" (Brach, 2007).

Regarding migration, the Barcelona Declaration's implicit rationale, as drawn from the above quotations, was that migratory pressures should be tackled through job creation and development, combating illegal immigration and protecting the rights of legal immigrants.[193] But no specific policy with regard to the migration challenge and its various dimensions was foreseen. The rationale was to tackle the root causes of migration such as unemployment and to cooperate in the field of illegal migration. The establishment of schemes for legal migration is certainly the missing link here.

Indeed, while the Free Trade Area to be established includes the liberalisation of the movement of goods, services and capitals, it is important to note that workers, not to say people, were not granted the same freedom of movement, even as a distant goal. At best, regular social dialogue shall be used to find ways to achieve progress in the field of free movement of workers alongside equal treatment and social integration. This reflects the static position taken by the partners regarding the liberalisation of labour force circulation at the time of the drafting of the EMAAs. It has to be recalled that at the time of the entry into force of the first EMAA, the Schengen rules were being implemented by most EU countries and admission of third-country nationals for economic purposes was officially banned.

Nevertheless, to the extent that the EMP will succeed, it is supposed to have an impact on migratory flows in the region, addressing the root causes of migration such as economic disparities and unemployment (Aubarell, and Aragall, 2003). According to this theory, progressive development and economic integration in the Mediterranean region would, in the long run, ensure job creation and increase the quality of life in southern Mediterranean Countries. Meanwhile, in the short term and due to economic adjustments, negative effects such as job loss are expected, which could intensify migration pressures.[194] Still, with regard to migration, no specific measures addressing those effects were foreseen.

190 April 2002; in entered into force in September 2005.

191 See articles 1 of the AA in the Appendix.

192 The ones with Tunisia, Morocco and Jordan were signed before the so called "communitarisation" of the legal basis related to migration by the Amsterdam Treaty in 1999 and thus before the Tampere Summit which set the milestones of European common policy, including the cooperation with third countries. While the ones with Egypt, Lebanon and Algeria were signed afterwards, it is worth noticing that they all include more extensive provisions in relation to cooperation in the field of illegal migration, even for Algeria a full Chapter on Cooperation in the field of Justice and Home Affairs.

193 They acknowledge the importance of the role played by migration in their relationships. They agree to strengthen their cooperation to reduce migratory pressures, among other things through vocational training programmes and job creation programmes. They undertake to guarantee protection of all the rights recognised under existing legislation of migrants legally resident in their respective territories. In the area of illegal immigration they decide to establish closer co-operation. In this context, the partners, aware of their responsibility for readmission, agree to adopt the relevant provisions and measures, by means of bilateral agreements or arrangements, in order to readmit their nationals who are in an illegal situation. To that end, the Member States of the European Union take citizens to mean nationals of the Member States, as defined for Community purposes.

194 See the Sustainability Impact Assessment Study of Euro-Mediterranean Free Trade Areas carried out by the Institute for Development Policy and Management of the University of Manchester.

This section will not evaluate the success of the Euro-Med partnership as a co-development project. Suffice it to say that scholarly work has already addressed this aspect.[195] Nevertheless, it should be stressed that a consensus has emerged on the weakness of the democratization process, as well as of the human dimension of the Partnership. More specifically, external political factors have undermined this process.[196]

Despite the enlightened and ambitious goals of the Barcelona Declaration regarding the building of bridges across the Mediterranean, no concrete measures regarding mobility of people are provided for in the EMAAs.

3.1.2 The Euro-Med Association agreements (EMAA) and Migration

In this section, we will further explore the EMAA's content. This will substantiate our statement regarding the absence of dynamic objectives for human mobility in the EMAA, and will give us the opportunity to show how each EMAA has a somewhat different approach towards migration.

Indeed, some provisions of the EMAA concluded with the Maghreb countries (Morocco, Algeria, Tunisia) reflect the peculiar relations that these countries have with European countries with regard to migration. The most recently concluded EMAAs, meanwhile, give, as we have already mentioned, more emphasis to the need for cooperation in the field of "illegal" migration but remain silent on a comprehensive approach to migration.

Beyond that, the Euro-Med framework provides for a privileged institutional framework in which dialogue on migration may be conducted at various political levels. This institutional framework has also provided the channels through which the ENP has progressively been implemented since 2003.

The EMAA dealt with migration issues under Chapters dedicated to "cooperation in social and cultural matters". In those chapters, some specific provisions related to migration are set out.[197]

The first important point to make is that, contrary to the expectations raised by the Barcelona Declaration regarding the establishment of a full-fledged Euro-Mediterranean Free Trade Area, the free movement of workers is not enabled by any of the Association Agreements.

In the following subsections, we will deal with specific provisions regarding migration (a), and give an overview of the institutional mechanisms through which the social dialogue regarding migration is supposed to take place (b).

a) Substantial provisions

Cooperation in the field of illegal immigration is seen as part of the partnership in only three of the EMAAs: with Algeria,[198] Egypt[199] and Lebanon.[200] It is important to note that all those that were

195 See i.e. A. MARCHETTI (ed.), "Ten Years Euro-Med Partnership – Defining European Interests for the next decade", ZEI, Discussion Paper, C154, 2005; J. BRACH, "The Euro-Mediterranean Partnership: The Role and Impact of the Economic and Financial Dimension", European Foreign Affairs Review, n°12, pp. 555-579, 2007; G. AUBARELL, G., and X. ARAGALL, "Immigration and the Euro-Mediterranean Area: Keys to Policy and Trends, EuroMescoPapers, n°47, September 2005; MARTÍN, I. "In Search of Development Along the Southern Border. The Economic Models Underlying the Euro-Mediterranean Partnership and the European Neighborhood Policy", in Anna Maria Ferragina (ed.), Bridging the Gap: The Role of Trade and FDI in the Mediterranean, Consiglio Nazionale delle Ricerche-Instituto di Studi sulle Società del Mediterraneo, 2009.

196 Terrorism and the fear that the changing elite would provoke a rise in Islamic political parties, and the breakdown of the Israeli-Palestinian peace process, L. KUHNHARDT, "10 Years Euro-Mediterranean Partnership – The Human Dimension Revisited", ZEI, Discussion Paper, C154, 2005.

197 For an exhaustive overview of those provisions, please refer to the tables in the Appendix. Here when we do not refer to one of the EMAAs in particular we make use the EC/Tunisia Association Agreement provisions, which was the first to be signed and served as a model for the negotiation of the others.

198 Title VIII Cooperation in the field of Justice and Home Affairs – Cooperation for prevention and control of illegal immigration article 84.

199 See Title VI Cooperation for prevention and control of illegal immigration (art. 68-70).

200 See Title VI Chapter 3 Cooperation for prevention and control of illegal immigration (art. 68-69).

signed after or during 2001 tackle this aspect.[201] This, for sure, reflects, the priority set by the European Council on the fight against illegal immigration and echoes the European Council's Seville Conclusions in June 2002. In these conclusions, the European Council urges "that any future cooperation, association or equivalent agreement which the European Union or the European Community concludes with any country should include a clause on joint management of migration flows and on compulsory readmission in the event of illegal immigration". In the other EMAAs, no direct commitment to cooperate in the field of illegal migration and readmission is made, and the fight against illegal migration is part of the social dialogue in which the parties are committed to engage on a regular basis.[202]

In the field of legal migration, provisions regarding the rights of migrants already residing legally in EU (or in a partner country) are set out. Yet, binding provisions subject to interpretation and enforcement by the European Court of Justice and national courts of the partners countries are only given for the Maghreb countries. According to the first article under Title VI of those EMAAs, the treatment accorded by each Member State to workers of Tunisian/Moroccan/Algerian nationalities employed in its territory shall be free from any discrimination based on nationality, as regards working conditions, remuneration and dismissal, relative to its own nationals. Temporary Tunisian, Moroccan, and Algerian workers are also envisaged. Again, they benefit from a non-discrimination clause solely in the field of working conditions and remuneration. It is to be stressed that Tunisia/Morocco/Algeria shall accord the same treatment to workers who are nationals of a Member State and employed in its territory.

Furthermore, workers from Tunisia/Morocco/Algeria and any members of their families living with them shall enjoy, in the field of social security, treatment free from any discrimination based on nationality relative to the nationals of the Member States in which they are employed. [203] All periods of insurance, employment or residence completed by such workers in the various Member States shall be added together for the purpose of pensions and annuities in respect of old age, invalidity and survivors' benefits and family, sickness and maternity benefits and also for that of medical care for the workers and for members of their families resident in the EU Community. The workers in question shall receive family allowances for members of their families who are resident in the Community, and shall be able to transfer freely to Tunisia/Morocco/Algeria, at the rates applied by virtue of the legislation of the debtor Member State or States, any pensions or annuities in respect of old age, survivor status, industrial accident or occupational disease, or of invalidity resulting from industrial accident or occupational disease, except in the case of special non-contributory benefits.

In fact, upon reading the specific provisions related to workers, it is clear that the agreements acknowledge the presence of immigrant workers in the EC (also reciprocity in rights for EU citizens in one of the partner country is foreseen) and consolidate their rights as far are they are legally residing in one member state, the scope of the non-discrimination principle being larger for residents than for the temporary workers.

It is only the Agreement with Algeria, article 83, which foresees the necessity to facilitate the movement of persons between the partner countries. But this facilitation is foreseen in the framework of mutual cooperation in the field of irregular migration with no concrete objectives or measures.

It is worth noting that no considerations for labour needs or the nature and quality of permit of stay or procedures or conditions for admission are included in the EMAAs. Indeed, reducing migratory pressure through social cooperation is one of the priorities in the field of social cooperation ("root cause approach"). In the social field, projects and programmes shall be carried out in any area of

201 Egypt AA was signed in June 2001, Lebanon AA in 2002 and Algeria AA in April 2002.

202 See article 69 AA-Tunisia, AA-Morocco and article 72 AA-Algeria. "Dialogue shall cover in particular all issues connected with: (c) illegal immigration and the conditions governing the return of individuals who are in breach of the legislation dealing with the right to stay and the right of establishment in their host countries".

203 The concept of social security shall cover the branches of social security dealing with sickness and maternity benefits, invalidity, old-age and survivors' benefits, industrial accident and occupational disease benefits and death, unemployment and family benefits.

interest to the parties: "Reducing migratory pressure, in particular by creating jobs and developing training in areas from which emigrants come; resettling those repatriated because of their illegal status under the legislation of the state in question".[204]

These cooperation channels took place in the framework of the MEDA programme.[205] Measures financed under the MEDA programme are selected, taking into account the beneficiaries' priorities, evolving needs, absorption capacity and progress towards structural reform. The provisions of association or cooperation agreements are also taken into consideration. However, at the regional level almost ten years elapsed before any regional programme was adopted in this field:

- Education and Training for Employment206 (2004-2007, €5 million), a project managed by the European Training Foundation to support MPCs in the design and implementation of technical and vocational education and training policies with the ultimate goal of promoting employment (the only Euro-Mediterranean project in the area of employment so far);207
- The EuroMed Migration I (2004-2007, €2 million) aimed to promote analysis and cooperation on questions linked to migration, and the social integration of immigrants. The project developed four research programmes: migration, transfers and development; Transit migration; border management; Diaspora and countries of origin. A database with information on migratory flows in the Mediterranean region has been created and studies were conducted on different areas, such as the Annual Report on Mediterranean migration.

b) Institutional dialogue in social matters

At the outset, the EMP was basically designed as a process to create a framework for multilateral as well as bilateral dialogue and cooperation. It has undoubtedly generated positive effects since it has brought various partners together and has managed to maintain a regular pace of dialogue even in cases of rising tensions between the Mediterranean countries. Social dialogue takes place at the same level and according to the same modalities as the political dialogue foreseen in the EMAA, which leaves various possibilities open.[208]

Each EMAA foresees a regular social dialogue which includes migration matters, however; the reciprocal minimal commitment targets the social aspects of migration and does not make an economically- or labour-centered dialogue mandatory.[209]

According to the EMAAs, the social dialogue with regard to migration is supposed to be conducted on "ways to achieve progress in the field of movement of workers and equal treatment and social integration for the one residing legally in a host country".

Each EMAA institutes an Association Council[210] which meets once a year at the Ministerial level and has decision-making power.[211] The Council is supposed to adopt provisions to implement the

204 Article 71 EMAA EC/Tunisia – Same provision in the EMAA EC/Morocco – See also article 73 of the EC/Algeria EMAA which covers a larger scope of priorities related to migration. See article 82 of the EMAA EC/Jordan, articles 63 of the EMAA EC/Egypt and Lebanon.

205 See Council Regulation No 1488/96 of 23 July 1996 on financial and technical measures to accompany (MEDA) the reform of economic and social structures in the framework of the Euro-Mediterranean Partnership, Official Journal, L 189 of 30.07.1996. Two MEDA have been funded. MEDA I from 1996-2000 and MEDA II from 2000-2006.

206 http://www.meda-ete.net.

207 For a report on this project, see Regional cooperation in education and training: the whole is more than the sum of its parts, European Training Foundation, http://www.meda-ete.net/meda-ete-web.nsf/opennews/6e32398ad71a0646c125 7474002b341f/$FILE/10%20MEDA-ETE%20project_Main%20achievements%20-%20FINAL%20-%20050509.pdf.

208 Article 5 EMAA's: Political dialogue shall be established at regular interval and whenever necessary notably: (a) at ministerial level, principally within the Association Council; (b) at the level of senior officials representing Tunisia, on the one hand, and the Council Presidency and the Commission on the other; (c) taking full advantage of all diplomatic channels including regular briefings, consultations on the occasion of international meetings and contacts between diplomatic representatives in third countries; (d) where appropriate, by any other means which would make a useful contribution to consolidating dialogue and increasing its effectiveness.

209 See article 69 of the EC/Tunisia EMAA and correspondent provisions in the others agreements.

210 See article 78 EMAA Tunisia. Composed by EU Council and Commission members and members of the partner country government.

211 Until now, our research substantiates that only propositions of 'Decisions' related to the coordination of social-security systems are currently discussed in the Association Councils (Tunisia, Algeria, Morocco and Israel). Those decisions, not yet adopted, will specify the scope of the social security system that is covered for the exportation of benefits. It is important to note that in conformity with the EMAA, the family members of workers may benefit from family allowance only if they reside in an EU country.

principles stated in the agreement and adopt detailed rules for administrative cooperation providing the necessary management and monitoring guarantees for the application of the provisions. The Association Committee[212] deals with the day-to-day implementation of the EMAA and meets at the level of officers. Specific sub-committees or working groups on specific issues may be created. The EMAA with Tunisia, for instance, establishes a working group with a view to monitoring social cooperation. In the framework of the EMAAs with Tunisia, Morocco, Egypt, Lebanon a specific working group on migration and social affairs has been established. Those institutional bodies are privileged places through which the EMP is enacted and monitored. For those of the Mediterranean countries which take part in the European Neighbourhood policy, they are also a place for dialogue and the monitoring of the Action Plans.

In short, if we were to evaluate the Euro-Med cooperation in this field after the first ten years, we would infer that "the Barcelona Declaration remains the normative ideal […]. Instead, the day to day implementation of the EMP has concentrated essentially on the economic basket, apparently confirming the perception that European political objectives were ill-defined from the outset".[213] Many observers would thus agree that the EMP in its socio-cultural pillar did not live up to the expectations that the Barcelona Declarations raised in November 1995. This is particularly relevant for migration issues as in this field no real progress has been made since 1995 at the Euro-Med level. According to observers, "there is a need to review established migration policies, given current trends in migration to Europe" in the framework of the Euro-Med partnership (Aubarell & Aragall 2003). In this regard the balance between "policies to control migration and the need for labour" has still not been found.[214] Thus, taking into account these gaps, the EU was invited to "reconsider the human dimension of its Euro-Mediterranean partnership." (Kuehnhardt, 2005). Moreover, there is consensus that "migration policies at the EMP level have not been effective enough to develop a common Euro-Mediterranean strategy" (Aubarell et al, 2009). This is not to deny though that at the national level, some frameworks through bilateral cooperation implement policies which to some extent match the Global Approach.[215]

3.2 The 2005 five-year Work Programme and the European Neighbourhood Policy – an opportunity for a "Global Approach to Migration" with Arab Mediterranean partners?

A new impetus inspired by the "Global Approach to Migration" promoted by EU stakeholders has been seen in the framework of the Euro-Mediterranean Partnership since 2005, both as a consequence of the new pillar on cooperation in Justice and Home Affairs and of the implementation of the European Neighbourhood Policy. In this context, it is important to recall that much has been said on the externalisation and extra-territorialisation of EU migration policies. This "remote control approach" aimed at transferring EU internal security preoccupations onto third countries and more particularly neighbouring countries.[216] However, in this section, we will not touch upon these aspects but will concentrate, instead, on the "root-cause approach"[217] which is better anchored in developmental concerns. We argue that that the ENP, while externalising the EU's labour needs, meets, to some extent, the labour needs and demands of sending countries. This aspect finds its expression in some ENP actions which emphasise legal migration opportunities to the EU. It is also

212 See article 81 EMAA Tunisia. Composed by EU Council and Commission members and members of the partner country government.

213 D. Schmid, " Interlinkages within the Euro-Mediterranean Partnership: linking Economic, Institutional and Political Reform : Conditionality Within the Euro-Mediterranean Partnership ", EuroMesco Papers, December 2003. With the same opinion, R. A. del Sarto and T. Schumacher, "From EMP to ENP: What is at Stake with the European Neighbourhood Policy towards the Southern Mediterranean?", European Foreign Affairs Review, n°10, 2005, pp. 17-38.

214 On this apparent contradiction between the need for labour in EU and the unwillingness to solve that need through legal immigration policies see J-L Reiffers, "L'impact de l'élargisssement de l'UE sur les partenaires Méditerranéens", 7th Annual FEMISE Network AMCinar, April 2003.

215 See for instance the Spain, French, Moroccan , Egyptian, and Mauritanian cases (Aubarell et al 2009) and (CARIM series on Circular Migration 2008) available at www.carim.org.

216 For an account on the "remote control" approach, see Zolberg , 2003, "The Archaeology of 'Remote Control'", in Fahrmeir, A. and Faron, O. and Weil, P. (eds) Migration Control in the North Atlantic World: The Evolution of State Practices in Europe and the United States from the French Revolution to the Inter-War Period. New York: Berghan Books quoted in Aubarell et al 2009, 14.

217 See Aubarell et al 2009, 14.

there in the EMP five-year program which acknowledges that "Migration, Social Integration, Justice and Security are issues of common interest in the Partnership, and should be addressed through a comprehensive and integrated approach," and emphasises that the Euro-Mediterranean partnership will enhance co-operation by promoting legal migration opportunities and facilitating the legal movement of individuals as important factors aiming at encouraging economic growth and improving cooperative channels between countries.

3.2.1 The Five-Year Work Programme: A new approach at a multilateral level

The Five Year Work Programme of the Barcelona Summit (28 November 2005) called for enhanced cooperation in the fields of Migration, Social Integration, Justice and Security through a comprehensive and integrated approach.

This chapter contains 6 objectives:

a) Promote legal migration opportunities: the facilitation of the legal movement of individuals, recognising that these constitute an opportunity for economic growth; the fair treatment and integration policies for legal migrants; and the facilitation of the flow of remittance transfers and an attempt to deal with "brain drain");

b) Reduce significantly the level of illegal migration (trafficking in human beings and loss of life through hazardous sea and border crossings);

c) Pursue the modernisation and efficiency of the administration of justice and facilitate access to justice by citizens;

d) Reinforce judicial cooperation (including on cross-border issues);

e) Facilitate solutions to problems arising from mixed-marriage disputes and child-custody cases and encourage cooperation in accordance with the principle of the UN Convention of 1989 on the Rights of the Child and national legislation;

f) Promote the ratification and further implementation of the relevant UN conventions on combating organised crime and drugs, and improve cooperation by law enforcement agencies.

To contribute to these objectives, it was decided to:

a) Hold a Ministerial meeting to discuss all issues pertinent to migration;

b) Develop mechanisms for practical cooperation and sharing experiences on managing migration flows humanely, (deepen dialogue with countries of origin and transit and explore options for providing assistance for countries of origin and transit);

c) Promote schemes for safer, easier, less expensive channels for the efficient transfer of migrants' remittances;

d) Develop ways to assist capacity building for those national institutions in partner countries dealing with expatriates;

e) Promote legal migration opportunities and integration of migrants;

f) Enhance cooperation to fight illegal migration. This cooperation should involve all aspects of illegal migration, such as the negotiation of different kinds of readmission agreements, the fight against human trafficking and related networks as well as other forms of illegal migration, and capacity building in border management and migration;

g) Develop contacts, training and technical assistance for judicial and legal professionals, building on the EuroMed Justice Programme;

h) Develop contacts, training and technical assistance for police and law-enforcement officers, building on ENP Action Plans and the EuroMed Police Programme, encouraging networks in the EuroMed region and drawing on the expertise of Europol.

During the 8th Euro-Mediterranean Conference of Ministers of Foreign Affairs held in Tampere in November 2006,[218] Ministers underlined the need to "strengthen the management of migratory flows in a comprehensive and balanced manner beneficial to the peoples in the whole Mediterranean region while respecting migrants' rights," and to intensify cooperation on all aspects of migration between all parties concerned, including the fight against trafficking in human beings and "negotiations of different kinds of readmission agreements." The Ministers decided to organise Euromed Ministerial meeting on migration in 2007. The 9th Euro-Mediterranean Meeting of Ministers of Foreign Affairs,[219] held in Lisbon on 18 and 19 November 2007, stressed "the need for continued progress by all Partners to achieve the strategic goal of optimising the social and economic benefits of migration for countries of origin, transit and destination, as well as continued cooperation in efficiently tackling illegal immigration." Ministers mandated the senior officials to reflect on ways and means to increase the added value of regional cooperation in the fields of Justice and Security in accordance with the Five Year Work Programme. The conclusions also mentioned two other international initiatives, the Rabat Euro-African Ministerial Meeting on Migration and Development, held 10-11 July 2006, as well as the EU-Africa Ministerial Meeting on Migration and Development, held in Tripoli 22-23 November 2006.

Under the Portuguese Presidency, the First Euro-Mediterranean Ministerial Meeting on Migration was held in Albufeira (Algarve) on 19 November 2007.[220] During this meeting, political and operational conclusions were approved. Facilitating legal movement is considered as one of the key elements of the cooperation "being aware of the globally positive effect of legal migration in terms of development." It was therefore proposed to "analyse the possibilities of facilitating and simplifying legal migration procedures for workers in demand, in order to improve legal channels for migration." These efforts would focus on "different categories of legal workers and could also include different forms of mobility such as circular and temporary migration, taking into account the needs of the Euro-Mediterranean countries labour markets as well as in terms of development."[221] "The needs of the countries of origin in terms of transferring competences and alleviating the consequences of the brain drain that migration can represent" and "the possibilities of facilitating and simplifying legal migration procedures for workers in demand, in order to improve legal channels for migration" were also taken into account. A series of measures were adopted, such as a working group on migration aspects of the labour market, the introduction of training courses for migrant workers, pre-departure professional training and linguistic courses for potential migrants; a seminar on the transfer of funds and micro-credit opportunities; training courses for the countries of transit on methods for the detection and identification of false or falsified and counterfeit identity and travel documents; enhancing capacity building related to departure flows and a strengthening of the relationship between fighting illegal migration and the respect for relevant international instruments. The Ministers made a commitment to hold regular meetings, through the establishment of task forces at the level of senior experts and officials to implement all the actions and supervise their progress.

Also, the link with migration and development in the partnership is stressed with the need to address the root causes of migration particularly poverty, unemployment, and the development gap. Those conclusions show that a shift in the realm of migration and its link with development and labour needs has occurred in the Euro-Mediterranean space – at least at the rhetorical level.

218 Tampere Conclusions: http://www.consilium.europa.eu/ueDocs/cms_Data/docs/pressData/en/er/91928.pdf.

219 Agreed Conclusions of the 9th Euro-Mediterranean Meeting of Ministers of Foreign Affairs, Lisbon, 5-6 November 2007, http://www.eu2007.pt/NR/rdonlyres/FF7CA6E4-5980-4B3A-A3B6-00D072967697/0/9ReuniaoEuromedMNES.pdf.

220 Ministerial Conclusions of the first Euro-Mediterranean Ministerial Meeting on Migration, 2007-11-19

http://www.eu2007.pt/UE/vEN/Noticias_Documentos/20071119Conclusoeseuromed.htm.

221 A first Euro-Mediterranean Employment and Labour Ministers Conference was held in Marrakech in November 2008.

On November 3-4 2009, the Euro-Mediterranean Ministers of Foreign Affairs[222] held in Marseille agreed that "important steps need to be taken in 2009 to implement the Barcelona Five Year Work Programme and the declaration of the Paris Summit in order to advance the regional integration process." A work programme for 2009 was therefore adopted, including "Developing a genuine social dimension".[223] As regards migration, the Ministers stated again that migration should be an integral part of the regional partnership. Legal migration, migration and development and the fight against illegal migration were to be addressed through a comprehensive, balanced and integrated approach, as well as the launching of EuroMed Migration II (2008-2011, €5 million), aiming at strengthen the Euromed cooperation in the management of migration, so as to build up the MPCs' capacity to provide an effective, targeted and comprehensive solution for the various forms of migration.

In the following section, we will show how the European Neighbourhood Policy instruments have reinvigorated the Euro-Med framework in the realm of migration.

3.2.2 The European Neighbourhood Policy: Which added value to Migration?

Against the backdrop of the Euro-Mediterranean Partnership and the post-2004 EU enlargement, a new framework regulating external relations emerged: the European Neighbourhood Policy (ENP). The latter has built on the existing Euro-Med partnership and has refined it by adding new incentives (a "stake in the internal market") and a new financial instrument:[224] some countries are invited to use legal tools such as bilateral agreements and to adopt the *acquis communautaire* through a soft method of coordination (the so-called Country reports and Action Plans) in the various fields of cooperation. Some of the Mediterranean Partners[225] take part in the ENP and have agreed on Action Plans with their EU partners with a view to developing strengthened cooperation in various fields.[226] In the case of the European Neighbourhood Policy, the regional dimension is still taken into account, but more emphasis is put on bilateral relationships, mainly through Action Plans – which are instruments adapted to each country's needs and willingness to move in the direction hoped for by the EU. This approach seems to favour more in-depth collaboration in migration matters, while also creating competition at the EMP level.

In its launch phase, the European Neighbourhood Policy raised new expectations regarding human mobility among EU neighbours.[227] Contrary to the initial EMP which mainly addressed the integration of third-country nationals and the fight against irregular migration, the Neighbourhood Policy accentuates the importance of an integrated approach to migration in EU-Arab Mediterranean relations including the movement of persons. In the Action Plans, new opportunities for legal economic migration are envisaged as part of a balanced approach and a positive option for both origin and host countries. Thus, the ENP strengthens the foreign agenda of migration and

222 Barcelona Process: Union for the Mediterranean, Ministerial Conference, Final Statement, Marseille, 3-4 November 2008, http://ue2008.fr/webdav/site/PFUE/shared/import/1103_ministerielle_Euromed/Final_Statement_Mediterranean_ Union_EN.pdf.

223 "Ministers should approve a framework of action setting out key objectives in the fields of employment policy, employability and decent employment opportunities. This framework will address strengthening the participation of women in the labour market, non-discrimination, integration of young people within the labour market. - Employment and Labour Ministers should approve an effective follow-up mechanism. - The cooperation of social partners across the Euromed region should be further developed. - Ministers mandated Senior Officials to identify ways and means to implement the objective of facilitating legal movement of individuals".

224 Regulation No 1638/2006 of the European Parliament and of the Council of 24 October 2006 laying down general provisions establishing a European Neighbourhood and Partnership Instrument, Official Journal L 310 of 9.11.2006.

225 Morocco, Tunisia, Egypt, Lebanon, Jordan.

226 It is noteworthy that Algeria has refused to engage in the ENP process.

227 The EU Commission Communication on "Wider Europe" (2003) stresses that: "The EU should aim to develop a zone of prosperity and a friendly neighbourhood – a 'ring of friends' - with whom the EU enjoys close, peaceful and co-operative relations. In return for concrete progress demonstrating shared values and effective implementation of political, economic and institutional reforms, including in aligning legislation with the acquis, the EU's neighbourhood should benefit from the prospect of closer economic integration with the EU. To this end, Russia, the countries of the Western NIS and the Southern Mediterranean should be offered the prospect of a stake in the EU's Internal Market and further integration and liberalisation to promote the free movement of – persons, goods, services and capital (four freedoms)".

introduces mutual commitments with a view to developing incremental joint migration management in the "illegal" but also the legal aspects.

Indeed cooperation in the field of justice, security and migration is at the top of the agenda of the ENP. For instance, the European Commission, in its 2006 communication "On strengthening the European Neighbourhood Policy",[228] identified the following "action points" concerning "mobility and migration":

- facilitating visas, removing obstacles to legitimate travel, e.g. for business, educational, tourism, official purposes;
- ensuring well-managed mobility and migration, addressing readmission, cooperation in fighting illegal immigration, and effective and efficient border management.

In its 2007 communication "A Strong European Neighbourhood Policy"[229] the European Commission noted that "the promotion of mobility will go hand in hand with the commitment of our partners to increase security and justice and fight illegal migration, with efforts to strengthen our neighbours' capacity to deal with migratory flows to their countries, and with the security of documents." Therefore, it urged the EU Council and the European Parliament to adopt "its 2006 'package' on legislative proposals aiming at revising the European Visa policy, ensuring a high level of security within the common area and simplifying the procedures for visa applicants."

It must be stressed that this issue is one of the priority areas of the ENP Regional Indicative Programme 2007-2013[230] which identifies a number of concrete projects and programmes.

So the statement that the ENP constitutes an important "policy shift" towards the Southern Mediterranean partners (Del Sarto & Schumacher 2005) on the basis of which the Euro-Med partnership has been re-stimulated is fully warranted in the field of migration.

Certainly the added value of the ENP process is to include, in a multifaceted international perspective, encompassing both the European-receiving contexts and Mediterranean-sending contexts, acts of cooperation enabling bilateral and regular dialogue among the actors. Hence, the ENP framework offers these actors structured and intensive collaboration channels, short and mid term objectives as well as monitoring processes with rewarding perspectives commensurate with each country's progress. It is, however, worth noting that in the field of migration, some Mediterranean Arab partner are more motivated than other to cooperate.

In the following section, we will show how the ENP integrates legal migration into its objectives and how bilateral relations between the EC and its neighbours are varied.

3.2.3 The ENP and legal migration

Legal migration is part of each of the Action Plans negotiated with the Arab Mediterranean countries included in the ENP (see Appendix where the elements related to migration or movement of persons between the EU and its neighbours are visible). Morocco and Tunisia are certainly the countries with which the Action Plans are the most advanced, but management of migration flows as well as visa facilitations are on each of the partners' agenda.

The ENP objectives are much more formulated, global and ambitious than those of the EMP. Regarding Egypt and Lebanon it is certainly too early to expect any concrete results with regard to the ENP. With Morocco and Tunisia, expectations could be higher, while for Jordan we must

228 Communication from the Commission on strengthening the European Neighbourhood Policy, COM(2006)726 final, 4 December 2006, http://ec.europa.eu/world/enp/pdf/com06_726_en.pdf.

229 Communication from the Commission "A Strong European Neighbourhood Policy", COM(2007) 774 final, 05/12/2007, http://ec.europa.eu/world/enp/pdf/com07_774_en.pdf.

230 ENPI Regional Strategy Paper (2007-2013) and Regional Indicative Programme (2007-2010) for the Euro-Mediterranean Partnership, http://ec.europa.eu/world/enp/pdf/country/enpi_euromed_rsp_en.pdf.

consider that not much has been done, except for information exchange.[231] According to the Commission follow-up report on Morocco (April 2008), thanks to EC funding supporting the movement of persons,[232] the level of legal migration from Morocco to EU has slightly increased. The Commission expresses a positive evaluation of the reinforcement of border control by the Moroccan authorities. Nevertheless, the issue of visa facilitation seems to be contingent on several factors including the conclusion of a readmission agreement. The report on Tunisia acknowledges intensification in border control and the fight against irregular migration by the Tunisian authorities, whereas in the field of legal migration, except for avenues permitting dialogue and meetings of experts, outcomes seem less concrete than for Morocco.

So in practice, at the EU level, when it comes to migration and relations with Mediterranean Arab countries, the concrete results are still, with the notable exception of Morocco, quite poor. Indeed, in comparison with Eastern neighbours no strong commitments are taken at the EU level. Reference might be made here to the mobility partnerships negotiated with Moldova or to visa facilitation offered to neighbouring countries.

Regarding the Arab Mediterranean Countries, mutual recognition has been established as a reciprocal interest in labour migration: at least with some of the countries – Morocco, Tunisia and Egypt. Also, some EU member states such as France, Spain and Italy have expressed their readiness to deepen cooperation with Arab Mediterranean neighbours, while other European countries are more reluctant to do so. Some member states show their interest in the bilateral relations that they have established with the origin countries.

It is worth noting that the European differentiated approach towards AMCs could explain the difficulty in finding a common migration policy towards the Mediterranean region at the EU level. Hence, elaborating a more consensual migration policy is crucial since visa policies have become of paramount importance to EU common policy and as some European actors have agreed on the necessity of immigration. A more consensual migration policy towards the Arab Mediterranean Countries might also empower the instruments of European Neighbourhood Policy and endow the Euro-Mediterranean partnership with a more coherent and far-reaching vision.

4. Conclusions and recommendations

The Euro-Arab Mediterranean space is currently the theatre of significant trends and opportunities in the field of migration. On the one hand, the European Union needs highly- and less highly- skilled migrants for short or long periods of stay so as to address its development pathway as well as its economic and social challenges. On the other hand, the Arab Mediterranean Countries face major problems such as high unemployment and the inability to efficiently manage the growth of their labour forces. It is certain that certain European countries have, to some extent, developed policies to respond to these needs. At the EU level, important actors – such as the EU Commission and partially the European Council and the Council of Ministers – are pleading for a renewed approach to migration which finds its finest expression in the “Global Approach to Migration”.

Still, in spite of this economic and social context which predisposes the two shores of the Mediterranean towards more cooperation, regular migration opportunities for economic purposes remain underdeveloped or involve discouraging procedures. This fuels irregular migration and aggravates its negative effects.

In this study, keeping in mind the multifaceted aspects of the Global Approach, we particularly stressed the emergence of proactive patterns in immigration/emigration policies in the Euro-Mediterranean region. Emphasis was also laid on assessing the efficiency and adequacy of instruments envisaged by the Global Approach to Migration, and how, if duly implemented, they could, indeed, respond to the needs of both sides of the Mediterranean.

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231 See Working Document by the EC Commission Following-Report for Jordan. SEC (2008)398, April 2008.

232 Support to the movement of people (MED/2003/5725).

More precisely, it was argued that if EU countries want to remain competitive in production, it is imperative that they encourage more skilled immigration. Arab Mediterranean countries that produce supply in skilled labour, could thus respond to this demand for highly-skilled migration provided that the education levels and quality of the labour force is taken into consideration. It was also argued that expanding seasonal and circular migration opportunities both for skilled and unskilled workers in the Euro-Arab Mediterranean context is beneficial to enhancing cooperation opportunities. In addition to that, this study highlighted how the Global Approach to Migration takes into consideration important realities at work in the Euro-Mediterranean region. For instance, the supply of skilled migrants in the Arab Mediterranean Countries, on the one hand, and the demand for temporary migration by the migrants themselves, on the other, pursue to some extent common interests shared with destination countries. These departure points could thereby provide realistic foundations for a more symmetrical "needs and demand-base" labour migration approach.

Furthermore, the paper shows how, in contrast with the EMP process before 2005, the current nexus between the European Mediterranean Partnership and the European Neighbourhood Policy (ENP) could serve as an institutional platform that could integrate the objectives of the "Global Approach to Migration", hence paving the way for more proactive cooperation at the EU level. At the regional level, the first Euro-Ministerial Conferences on Migration (November 2007) and on Labour and Employment (November 2009) are expected to give prominence to region-wide strategies in these fields.

Indeed, the Euro-Med framework and the European Neighbourhood policy constitute an important reference framework for implementing the Global Migration Approach for various reasons. First, the framework envisages the facilitation of mobility (as an aim though no enforceable provisions are stated), and targets non-discrimination when it comes to third-country workers (with enforceable provisions). In addition to that, the ENP Action Plans provide more constructive avenues for addressing the Global Approach to Migration since they specifically tackle the external aspects of migration.[233] It is true that divergent priorities on each side of the Mediterranean have incontestably obstructed the consolidation of the Euro-Mediterranean framework. Thus, while EU countries focus on joint responsibility and control of migration flows, the origin countries of the Mediterranean fix their attention on development concerns and plead for a facilitated movement of persons and the integration of legal-resident migrants. Nonetheless, it should be noted that the Action plans are adequate methods to strive for more convergence in policy outcomes and bridge the gap in migratory discourses, since they are tailored to the needs of origin and host countries and offer contextual devices to address the divergences.

These observations notwithstanding, many drawbacks undermine an efficient orientation line in the EU's labour strategy towards the Arab Mediterranean and impede constructive Euro-Arab Mediterranean cooperation.

On the one hand, upon assessing the EU's level of action, one has to keep in mind that despite gradual harmonization at the EU level in the realm of migration policy and despite the fact that a more unified labour strategy has emerged, divergent national policies still supersede supranational decisions. In addition, overriding national competences take the lead in spite of the Commission's efforts to communitarise certain labour and migration orientation lines.[234] The Document of the French Council Presidency (2008), which is expected to shape EU legislation and policy orientation in migration issues in the years to come shows that national governments will remain the main actors as far as the proactive side of European immigration policies are concerned. Different national set-ups and labour-market configurations, as well as different labour preferences,

233 Already in 2001, the Report of the European Parliament on "the EU-Mediterranean Relations: a Re-Launch of the Barcelona Process", notes that migration policy must be based on the circulation of workers. It seems that the ENP, at least in its discourse, takes the need for more mobility into account.

234 Key issues are divergences over unanimity voting, limited competences in the field of legal migration, inconsistencies between security concerns and the need for legal migration and mobility.

delay an intersection of policy outcomes. Moreover, much controversy revolves around the future orientation tracks of a unified EU labour-migration strategy.[235]

On the other hand, drawbacks inherent in the Global Approach to Migration get in the way of strengthening EU-Arab Mediterranean labour and migration cooperation. Thus, despite its enlightened approach, with its determination to take into account the root causes of migration, the Global Approach to Migration does not give much space to the role of sending countries. Furthermore, solid literature and empirical evidence supporting the efficiency of the instruments of the Global Approach (the Blue Card, Circular Migration schemes…) and whether they could really be adequate in responding to the needs of the Arab Mediterranean Region are still lacking. Also, there is controversy over whether instruments such as the Blue Card are suitable and attractive enough to satisfy the need for highly-skilled migration to Europe.

Beyond these difficulties, some specific recommendations for more policy convergence in the Euro-Arab Mediterranean framework can be made:

At the EU institutional level

Institutional changes in EU decision-making should take place so that a firmer and clearer orientation line emerges at the EU level. In the Lisbon Treaty (2008), the European member states accepted the adoption of legal-migration instruments on the basis of qualified majority voting involving the European Parliament. Indeed, legal migration into Europe will be a predominant topic for the 2009-2014 legislature. This could provide the basis for a more efficient cooperation strategy in migration matters between the EU and the Arab Mediterranean countries.

At the Euro-Arab Mediterranean institutional and policy-making level

In order to improve the comprehensiveness of the Global Approach to migration and remedy the gaps left by its instruments, it is important to:

- Empower institutions and legal channels addressing the recruitment of labour forces on both sides of the Mediterranean;
- Ease access to work permits in the EU space and inside the EU (e.g. provide fast-track procedure visas);
- Encourage visa and institutional policies that favour temporary patterns of migration and mobility;
- Refine temporary migration programs and make them more attractive by guaranteeing social rights and the portability of benefits even if such programmes are only a labour strategy, and cannot solve, in the near future, the demand for income and jobs for all potential migrants;
- Improve the recognition of educational degrees in the EU and create more institutional and legal synergies between academic institutions from either side of the Mediterranean.

At a bilateral level

The Euro-Arab Mediterranean framework should give prominence to bilateral initiatives which match the objectives of the "Global Approach to Migration". Positive outcomes at a bilateral level could thus provide a propitious constellation able to convince other reluctant parties to join. Also, monitoring current bilateral experiences,[236] assessing their economic, social and human dimensions, and detecting positive gains and outcomes should become a policy-making priority so as to enhance cooperation and activate new cooperative dynamics in the Euro-Arab Mediterranean context.

235 Scenarios oscillate between an approach centred on promoting selective labour migration and building intrinsic and extrinsic boundaries; an approach favouring intra-EU labour mobility, hence stressing internal labour mobility but establishing strong external borders undermining chances for non EU-labour migrants; a third approach advocating the abolition of both internal and external borders and the promotion of labour mobility and integration within the EU as well as labour mobility originating from non-EU countries.

236 Egypt-Italy; Morocco-Spain; Mauritania-Spain; Italy-Tunisia; France-Tunisia/Morocco.

In addition to these recommendations whose overarching aim is to consolidate policy convergence and joint migration management in the Euro-Arab Mediterranean region, the paper strongly advocates **the concretization and contextualization of the Global Migration Approach with respect to the Arab Mediterranean region** through the following tangible measures: initiating bilateral and regional consultative processes (RCPs) in the Euro-Arab Mediterranean context tackling the potential launching and implemention of mobility partnerships and circular migration schemes. These consultative processes should identify concrete and specific collaboration steps, namely under which circumstances mobility partnerships could be launched, how to solve policy divergences hampering such initiatives, and how these partnerships could reflect an integrative migration approach taking into account all categories of migrants. These processes should also define parties' interests and expectations with a view to forging a transparent dialogue on migration in the Euro-Arab Mediterranean region.

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Appendix (see Annex separate file)

I. Association agreements concluded by the EC and the EU countries with Mediterranean Partners (Euro-Mediterranean framework)

II. Action Plans with Southern Mediterranean Neighbors in the framework of the ENP
Development Group, Middle East and North Africa Region September 2.

EUROPEAN ECONOMY

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Labour Markets Performance and Migration Flows in Arab Mediterranean Countries: Determinants and Effects

Volume 2
National Background Papers Maghreb (Morocco, Algeria, Tunisia)

Directorate-General for Economic and Financial Affairs

Economic and Financial Affairs
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Directorate-General for Economic and Financial Affairs

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Volume 2

National Background Papers Maghreb (Morocco, Algeria, Tunisia)

STUDY

LABOUR MARKETS PERFORMANCE AND MIGRATION FLOWS IN ARAB MEDITERRANEAN COUNTRIES: DETERMINANTS AND EFFECTS

The European University Institute (RSCAS) was selected by the European Commission to carry out a Study on "Labour Markets Performance and Migration Flows in Arab Mediterranean Countries: Determinants and Effects" (Nº ECFIN/D/2008/036).

Co-financed by the European Commission (DG Economic and Financial Affairs and DG Employment)

Scientific Director: Philippe Fargues

Project Coordinator: Iván Martín

Objectives

The objectives of the Study are two-fold:

- to analyze the key labour market determinants of migration flows from selected Arab Mediterranean Countries (Algeria, Egypt, Jordan, Lebanon, Morocco, Syria, Tunisia and the Occupied Palestinian Territories), with a particular emphasis on demographic pressures, wage differentials and relative income disparities with the EU, employment policies, labour market flexibility and unemployment rates; this analysis includes the impact of migration on the labour markets of Arab Mediterranean Country (AMCs) labour markets;
- to propose a series of specific recommendations to improve the design of the EU's migration policies towards AMCs and policy options available to them for the management of mismatches between labour supply and demand.

Team of Experts for the Study

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Fatiha Talahite, CNRS, Université Paris 13 Nord, France
Alessandra Venturini, Executive Director, CARIM, EUI, and Universitá de Torino
Jackline Wahba, University of Southampton, UK

Background papers

To cope with the ample regional diversity and the variety of issues addressed in the Study, 10 background papers were commissioned to feed the Study:

8 national background papers on labour markets performance and migration flows in Arab Mediterranean Countries. A country-by-country analysis (Algeria, Egypt, Jordan, Lebanon, Morocco, Syria, Tunisia and the Occupied Palestinian Territories), following a common questionnaire, of the migration trends in the AMCs, with particular emphasis on key labour market factors such as demographics, labour costs, skills composition, effectiveness and efficiency of current employment policies, recent labour market reforms, contractual arrangements and size of the informal sector.

2 thematic background papers on “EU Migration Policy towards AMCs and its Impact on their Labour Markets” and “The Impact of Migration on AMC Labour Markets: A Bibliographical Review”.

Activities

The Study was carried out between January and October 2009. The main activities were the following:

- Methodological Workshop. Florence, 28 January 2009. A one-day co-ordination workshop focused on methodology and data issues for the National Background Papers.

- Validation Workshop. Montecatini Terme, 26-27 March 2009. A two-day workshop to discuss and validate National and Thematic Background Papers and to undertake a regional comparative analysis of labour markets performance and migration flows in AMCs.
- Policy-Makers and Experts Conference on “Labour Markets and Migration Flows in Arab Mediterranean Countries”. Cairo, 11-12 October 2009. Jointly organised by the EUI, Cairo University and the European Commission. A two-day conference for policy makers, labour market specialists and experts on migration issues from the EU and the AMCs to present and discuss the final Study and proposals and recommendations to improve the design of the EU’s migration policies towards AMCs and policy options available to them for the management of mismatches between labour supply and demand.

For more information on the Study

www.eui.eu/DepartmentsAndCentres/RobertSchumanCentre/Research/Migration/LabourMarketsMigration/Index.aspx

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Chapter I – National Background Paper

Labour Markets Performance and Migration Flows in MOROCCO

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1. L'offre de travail: situation et perspectives

Le Maroc connaît une transition démographique, à savoir le passage de taux élevés de natalité et mortalité à de faibles taux y afférents, transition typique des sociétés agricoles en sociétés davantage urbaines et industrielles. Avec la modernisation, la fécondité diminue, avec pour résultat une baisse régulière de la croissance de la population. En dépit de ce ralentissement, les projections démographiques prévoient un rythme de croissance des effectifs de la population encore soutenu, au cours des prochaines années. Cette croissance serait accompagnée d'un changement remarquable dans la structure par âge de cette population. L'offre de travail saisie à travers l'évolution de la population active a connu une évolution importante au cours des deux dernières décennies aussi bien du point de vue de ses effectifs que de sa composition selon l'âge, le milieu, le niveau de qualification ou encore le secteur d'activité. Cette évolution reflète dans une large mesure les mutations profondes induites par la dynamique démographique mais aussi par les changements de comportement de la population en âge d'activité dans un contexte économique et social en pleine transformation.

1.1 Dynamique démographique et projections

Selon les chiffres officiels provenant de la Direction de la Statistique, la croissance démographique du Maroc a suivi un schéma similaire aux pays de la région MENA: elle a augmenté en moyenne de 2,5% entre 1960 et 1990, a diminué à 1,7% dans les années 90, et selon le dernier recensement national, le taux a atteint 1,2% en 2004 pour une population estimée en cette date à 29,7 millions d'habitants. Ces taux sont le résultat d'une combinaison d'une baisse marquée des taux de mortalité infantile - de 130 en 1962 à environ 39 en 2002- et des taux de fécondité- de près de sept naissances par femme en 1960 à 2,8 en 2002- et de flux réguliers de migration à l'étranger[1].

Projections démographiques

Au Maroc, la seconde phase de la transition démographique a commencé il y a environ 30 ans et elle touche à sa fin. La période d'augmentation rapide de l'espérance de vie a pris place entre 1950 et 2000 lorsque l'espérance de vie à la naissance est passée de 43 à 68 ans. La chute rapide du nombre moyen des naissances par femme a commencé plus tard, au début des années 1970, pour se conclure aux environ du millénaire. Au cours de cette période, le taux de fertilité total est tombé de sept à trois naissances par femme. À cause du décalage entre la baisse de la mortalité et la baisse de la fertilité et du fait qu'il faut compter environ deux décennies pour que les nouveau-nés entrent sur le marché du travail, la part des individus en âge de travailler dans la population totale continuera à augmenter jusqu'à l'an 2035 environ. Au-delà de ce point, la part de la population âgée de 60 ans et plus augmentera plus rapidement que la part de la population en âge de travailler. Le changement de la structure de la population va s'accélérer à partir de 2020. Ainsi, le poids de la tranche d'âges des moins de quinze ans continuera à baisser dans l'avenir, au profit des tranches d'âges 15-59 ans et 60 ans et plus[2]. La part de la tranche âge des 15-59 ans qui constitue la population potentiellement active, atteindrait son point culminant entre 2010 et 2020 et représenterait environ les deux tiers de la population (65%).

Les taux de fécondité plus faibles ont modifié la composition du taux de dépendance, ce qui a rajouté des pressions énormes pour la création d'emplois. Le taux de dépendance démographique

1 L'évolution de la mortalité et fécondité est conforme aux schémas mondiaux et s'explique principalement par les progrès réalisés au niveau des conditions de santé, urbanisation, et éducation féminine, les femmes qui pénètrent le marché du travail en milieu urbain faisant l'expérience d'un coût d'opportunité plus élevé lié aux naissances, ce qui retarde les décisions concernant le mariage et la fécondité et incite les parents à investir dans la qualité d'un plus petit nombre d'enfants.

2 En effet, cette tranche d'âge des moins de 15 ans qui représentait en 1960 environ 44,4 % de la population totale ne représenterait, selon les projections du Centre d'Etudes et de Recherches Démographiques, que 17,7 % en 2060. Par ailleurs, les implications de l'évolution démographique sur la part de la population âgée de 60 ans et plus seront plus perceptibles à partir de 2020. La part de cette tranche d'âge dépasserait, ainsi, 11 % de la population totale et atteindrait 20% en 2040 et 27 % en 2060.

total (le taux de la population dépendante totale par rapport à la population en âge de travailler), a été tiré vers le bas par la réduction du taux de dépendance démographique des jeunes (le taux de jeunes dépendants par rapport à la population en âge de travailler). Ces deux taux se sont réduits rapidement depuis les années 1980. Le taux de dépendance a régulièrement diminué pour passer de 0,9 à moins de 0,6 au cours des deux dernières décennies. La structure d'âge de la population active s'est modifiée au cours des deux dernières décennies de la cohorte d'âge des plus jeunes à celle des travailleurs plus âgés. La cohorte d'âge des 25 à 44 ans a augmenté de 10 points de pourcentage pour atteindre 60% de la population active. Or cette tendance devrait se terminer aux environs de 2015 lorsque le taux de dépendance des personnes âgées (le taux de la population « âgée » par rapport à la population en âge de travailler), commencera à augmenter de manière soutenue. En conséquence, la baisse du taux global de dépendance ralentira. En 2035, le taux global de dépendance commencerait à augmenter.

Le Maroc connaîtra dans les deux décennies 2000-2020 une période d'aubaine démographique[3]. En principe, il a encore un créneau d'opportunité pour bénéficier d'un «dividende démographique» et augmenter le taux de croissance du PIB par habitant[4]. Cependant, il est clair que pour réaliser ces gains, l'économie doit être en mesure d'absorber les nouveaux entrants sur le marché du travail[5]. Il est estimé (David A. Robolino, Banque Mondiale, 2008) que le dividende démographique pourrait ajouter 0,9-1,2 points de pourcentage au taux de croissance annuel du PIB par habitant au Maroc d'ici 2015[6]. Pour mettre ces chiffres en perspective, 0,9-1,2 points de pourcentage supplémentaires par an augmenteraient le revenu par personne de 7,5–10% d'ici 2015. Entre 2015 et 2035 le taux de dépendance continuera à diminuer, mais à un rythme beaucoup plus lent.

Toutefois, les gains démographiques pourraient être neutralisés par la migration qui devient un déterminant important de l'offre d'emplois au Maroc. En fait, aujourd'hui il y a plus de trois millions de Marocains (10 % de la population), qui vivent en Europe. Une proportion accrue de migrants est constituée de travailleurs qualifiés, ce qui pourrait limiter l'expansion des secteurs à haute valeur ajoutée qui préconisent l'introduction de nouvelles technologies de gestion et de production. Dans le passé, la migration n'était pas considérée comme un obstacle à la croissance économique. Au contraire, la migration aidait à contenir l'augmentation du taux de chômage étant donné que l'économie n'était pas en mesure d'absorber les nouveaux entrants sur le marché du travail. De plus, en 1990, 80% du stock de migrants avaient de faibles niveaux d'éducation. A partir de 2000 toutefois, la part des migrants non-qualifiés a diminué tandis que celle des migrants qualifiés a augmenté et est aujourd'hui est proche de 20 %. Le problème est circulaire. D'une part, les travailleurs qualifiés migrent en raison du manque d'opportunités d'emplois de qualité au Maroc et de la perspective de revenus meilleurs. D'autre part, la migration des travailleurs qualifiés peut entraver l'émergence de secteurs à haute valeur ajoutée et de productivité élevée.

Les travaux de prospective du HCP

Les travaux de prospective démographique entrepris par le Haut Commissariat au Plan (HCP) donnent une série d'indications sur l'évolution de la population marocaine à l'horizon 2030 et ses effets sur

3 Cet effet d'aubaine réside dans les caractéristique suivantes: une diminution du pourcentage des moins de 15 ans, un élargissement considérable du pourcentage des 15-59 ans, c'est-à-dire des personnes d'âge actif et une augmentation modérée des plus de 60 ans.

4 Le dividende démographique peut accroître la croissance du PIB à travers trois circuits: offre d'emplois, épargne et capital humain. Tout d'abord, un ratio total de dépendance plus faible signifie que, toutes les autres choses étant égales, il y a plus d'individus qui travaillent que d'individus qui ne travaillent pas. Ensuite, les individus en âge de travailler tendent à produire plus de revenu et à épargner davantage que les générations jeunes ou âgées – en particulier si la taille des familles se réduit. Ceci ouvre des possibilités pour t une accumulation de capital plus rapide. Enfin, des cycles de vie plus longs offriraient des incitations à accroître les investissements dans du capital humain, y compris davantage d'éducation pour les enfants.

5 A ce jour, l'insuffisance de croissance et de création d'emplois a transformé l'aubaine démographique en un fardeau. Il en est résulté des taux de chômage élevés, notamment parmi les jeunes, ainsi qu'une migration à l'étranger.

6 Royaume du Maroc. Développement des compétences et protection sociale dans le cadre d'une stratégie intégrée pour la création d'emploi. Document de la Banque Mondiale. Région Moyen Orient et Afrique du Nord. Groupe des secteurs sociaux (MNSHD). 2008. Page 8.

l'émigration[7]. Les principaux facteurs démographiques qui vont le plus influencer l'avenir à l'horizon 2030 sont par ordre d'importance décroissante: i) la poursuite de la pente descendante de 'évolution de la fécondité, ii) les tendances de la mortalité et l'évolution des gains d'espérance de vie, iii) la répartition initiale par âge, sur laquelle s'inscrivent le nombre potentiel de femmes en âge de reproduire, iv) le solde des échanges migratoires avec le reste du monde.

Les effectifs de la population sont approchés selon différents scénarios dont: i) un scénario à effectifs avec migration nette nulle, ii) des scénarios à effectifs avec migration, iii) un scénario tendanciel.

Le scénario tendanciel est proposé comme repère. Il suppose une migration nette de - 100 000 émigrants par an à l'année de base 2004, effectif qui diminuerait progressivement jusqu'à s'annuler vers l'horizon 2034 (environ 13 000 en 2030). Autrement dit, le caractère de pays d'émigration du Maroc ne disparaîtra pas de si tôt, compte tenu de l'inertie démographique de sa structure par âge qui engendrera des effectifs accrus aux âges d'activité allant en s'intensifiant.

Au Maroc, rappelons que le recul du ratio entre le nombre de jeunes de 15 à 25 ans et celui des gens de 65 ans, au demeurant très faible, n'est pas un signe de détente, compte tenu à la fois de la longueur des files d'attente, de l'écart par rapport au coefficient d'équilibre, égal à 1 (autant de postulants que de « sortants »), et surtout de l'extraordinaire montée des jeunes. C'est à partir de 2020 que le passage à la soixantaine des générations du baby-boom nées depuis 1960 devrait atténuer le déséquilibre entre les flux potentiels d'entrants et ceux des sortants: le ratio évoqué plus haut ne devrait être alors que 1,8, au lieu de 2,7 en 2006.

D'ici 2020 et en ce qui concerne la jeunesse marocaine, deux soupapes de sûreté existent:

- d'une part, une *mise à niveau de l'appareil scolaire et universitaire:* le pourcentage de lycéens et d'étudiants est bas, incompatible avec les besoins d'une économie moderne: le développement de l'appareil de formation devrait ainsi contribuer à *alléger l'afflux de jeunes en quête d'emplois;*
- d'autre part, la *poursuite, à moyen terme, des courants* de départs vers l'étranger. La question la plus délicate est la très basse productivité globale du secteur agricole et sa relative stagnation: en effet, non seulement la productivité relative du travailleur agricole est faible, mais elle ne progresse que très lentement.

Dans une réflexion récente, le démographe Y. Courbage[8] a présenté trois scénarios d'évolution de la population marocaine à l'horizon 2030. Il considère qu'il n'est pas impossible de moduler l'amplitude de l'émigration internationale marocaine à l'avenir selon les rythmes de la croissance démographique.

- Dans le **scénario pessimiste**, l'évolution démographique future serait empreinte d'une certaine fermeture du Maroc sur le monde extérieur et d'un repliement sur les valeurs dites traditionnelles[9]. Dans ce scénario, les changements politiques et culturels inciteront des Marocains jeunes et moins jeunes à tenter l'aventure hors du pays. Le mouvement migratoire serait quantitativement limité, il toucherait préférentiellement les élites occidentalisées et polyglottes.
- **Le scénario optimiste** est celui de l'ouverture du pays, une ouverture qui présuppose une pleine acceptation de la mondialisation économique et culturelle. Dans ce scénario, l'instruction de base et jusqu'aux niveaux les plus élevés évoluera quantitativement et qualitativement. Avec ce scénario, la propension à émigrer à l'étranger ira en diminuant.

7 Royaume du Maroc. Haut Commissariat au Plan. Prospective Maroc 2030. Quelle démographie? 2008.

8 Y. Courbage: L'accélération de la transition: un bonus démographique pour le Maroc. Royaume du Maroc. HCP. Prospective Maroc 2030. Actes du « Forum II: La société Marocaine. Permanences, changements et enjeux pour l'avenir ». 2008, page 23.

9 Avec ce scénario, la fécondité restera de 10-15 % supérieure à ce qu'elle serait dans le scénario optimiste et atteindra en 2030 la valeur de 2,07 enfants par femme, c'est-à-dire juste ce qu'il faut pour assurer la relève des générations.

- **Le scénario optimiste plus.** La politique multiforme d'ouverture du Maroc sera encouragée par une meilleure réponse de l'Europe qui serait plus généreuse dans ses investissements directs au Maroc et ne mettrait plus d'entraves à la circulation des Marocains dans l'espace Schengen. Les retombées de ce scénario seraient spectaculaires. La forte montée du niveau d'instruction et la contagion européenne également pourraient favoriser une chute de la fécondité en 2030.

Dans le scénario optimiste, les entrées *nettes* qui prennent en compte les départs à la retraite après 65 ans s'effondreront littéralement: 544 000 actuellement, 346 000 seulement en 2025-2030, ce qui donne une vision plus optimiste de l'avenir du marché de l'emploi. Avec de moins en moins de nouveaux entrants nets, les chômeurs cumulés d'une année sur l'autre auront plus de chance de s'intégrer au marché de l'emploi. Les femmes pourraient revenir occuper les places qui leur reviennent, une féminisation qui militera en faveur de leurs droits. Il n'est pas exclu que ces transformations agissent sur la propension à émigrer des travailleurs marocains, l'absence de travail ou l'insatisfaction liée aux conditions de travail ayant toujours constitué la raison majeure du départ vers l'étranger. Au moment où l'Europe aura le plus besoin de « migrations de remplacement » pour faire face aux fortes diminutions de sa population active, la main-d'œuvre marocaine sera moins encline à émigrer grâce aux possibilités du marché local.

L'effet sur le marché du travail

Si la population en âge d'activité, exerce déjà une pression démographique non négligeable sur le marché du travail, cette pression est susceptible de s'accroître de plus en plus en fonction de l'évolution des effectifs des demandeurs d'emplois. Sur la base des taux d'activité tendanciels, l'offre de travail passerait de 11,3 millions en 2005 à 13,8 millions en 2015 et à 14,8 millions en 2020, ce qui correspond à une offre additionnelle annuelle de 245200 et 233800 respectivement. Compte tenu de l'exode rural dans les villes, plus de 90% du surcroît de l'offre de travail sera localisé en milieu urbain.

Le problème de l'emploi demeure l'une des difficultés majeures à laquelle le système économique reste confronté. Les créations d'emplois n'atteignent actuellement que les deux tiers des besoins. Compte tenu de l'importance du stock des chômeurs et d'une croissance économique qui reste en deçà des aspirations, les risques d'aggravation du déficit d'emploi ne sont pas négligeables. Cette situation pourrait entraîner le développement du chômage structurel et oblige particulièrement les jeunes à exercer des activités précaires ou marginales dans le secteur informel.

La transition démographique et la participation croissante mais volatile des femmes ont donné lieu à des taux de participation à la population active (TPPA) plus élevés. Des TPPA légèrement supérieurs - population économique active âgée de 15 à 64 ans - soulignent les tendances démographiques et une nette augmentation des taux de participation des femmes. Les TPPA au Maroc sont passés de 52% en 2005 à 56% en 2007. Ce résultat dérive du changement dans la structure d'âge de la population active et de la hausse des taux de participation des femmes au cours de la même période.

Tableau 1.1. Dynamique démographique et projections

		2000	2005	2010	2015	2020
Population Totale	Nombre	28466	30172	31851	33503	35112
	Changement	2443	1706	1679	1652	1609
Population en âge de travail (15-64)		19397	20061	22005	24096	25828
Taux de participation à la population active		52,5	56,3	57,3	57,1	57,3
	Masculin (%)	73,7	83,8	83,6	82,2	80,9
	Féminin (%)	28,8	29,0	30,3	31,0	32,3
Force de travail	Nombre	10199	11312	12600	13764	14819
	Changement	2204	1113	1288	1164	1055
	Masculin	7565	8400	9311	10103	10784
	Féminin	2634	2912	3289	3661	4035

La population active féminine augmente en fait avec les niveaux d'éducation: elle double pratiquement d'environ 40% pour les femmes ayant suivi l'enseignement primaire et le premier cycle du secondaire à plus de 70% pour les femmes ayant suivi l'enseignement technique ou universitaire (Banque mondiale 2004). En outre, la dynamique de la composition des genres de la population active est très volatile. Au cours des 20 dernières années, alors que les TPPA des femmes étaient nettement inférieurs à ceux des hommes, les femmes entraient et sortaient aussi plus rapidement de la population active que les hommes: les taux annuels de changement des TPPA des femmes indiquent un degré plus significatif de volatilité que ceux des hommes en milieu urbain. Les TPPA donnent une indication de la taille relative de l'offre de main-d'oeuvre.

Cette variabilité contrastante entre les taux de participation des femmes et des hommes du milieu urbain est surprenante: elle peut traduire un traitement différent dans le statut d'emploi des deux catégories et dans la composition des genres des tendances migratoires rurales-urbaines ou intérieures-extérieures. Par ailleurs, les TPPA urbains diminuent pour toutes les cohortes d'âge mais la baisse la plus importante est observée pour la cohorte des plus de 60 ans, suivie par celle des 15 à 24 ans. Ces tendances peuvent être associées avec une discrimination à l'égard des personnes plus âgées en raison des taux de chômage élevés ou au fait que les jeunes décident de rester à l'école plus longtemps avant d'entrer dans la population active formelle ou de migrer.

La transition démographique a donc donné lieu à une croissance positive de la population active.

Conformément aux schémas antérieurs, la croissance de la population en âge de travailler demeure positive, mais en baisse régulière, d'une moyenne de 3,4% par an au cours de 1985–90 à 2,1% par an au cours de 2000–07. Cependant il y a des raisons d'être optimiste: ce taux est un des plus faible de MENA, dont la moyenne est supérieure à 3% par an. 1. L'offre de travail: situation et perspectives

Ce taux reflète, toutefois, des tendances divergentes entre la main-d'oeuvre rurale et urbaine. La migration des zones rurales vers les villes a alimenté une rapide expansion de l'offre de main-d'oeuvre dans les centres urbains au cours des années 1986–2007 avec une hausse importante de la main-d'oeuvre urbaine de l'ordre de 2,7 millions de travailleurs. Ce changement est contrebalancé par une stagnation virtuelle de la main-d'oeuvre rurale à 5,3 millions de travailleurs. Ainsi, la croissance de la population active (et de l'emploi) a essentiellement eu lieu dans les villes.

En l'absence d'une croissance économique forte et soutenue, le Maroc ne pourra pas exploiter l'effet d'aubaine et la fenêtre démographique favorable des deux premières décennies du millénaire. En effet, l'augmentation considérable de la population active induira une très forte demande d'emploi qu'il faudra bien satisfaire. C'est le défi majeur pour le pays au cours des 15 prochaines années. Si la tendance de croissance actuelle de l'économie se maintient, les tensions sur le marché du travail risquent de devenir intolérables et de peser lourdement sur le climat social et la cohésion sociale en reproduisant la pauvreté et en créant de nouvelles formes de pauvreté.

1.2 Caractéristiques et composition de la force de travail et de l'emploi

Sur une population totale estimée, en 2007, à près de 29 millions de personnes, le nombre d'actifs s'élève à 11,1 millions personnes, soit un taux brut d'activité de 36,1%. L'offre de travail globale se répartie selon 73,4% d'hommes et 26,6% de femmes, dont 53,3% résidant en milieu urbain et 46,7% en milieu rural. Sur la longue période, l'offre de travail s'est accrue à un rythme annuel moyen de 3,2%. Comparé à l'accroissement annuel moyen de la population globale de 2,2%, ce taux met en évidence un constat important de la problématique de l'emploi: l'offre de travail a cru à un rythme nettement plus rapide que celui de la croissance démographique, le premier étant supérieur de 37% au second.

Composition par sexe: une tendance à la féminisation

Durant les trois dernières décennies, outre le phénomène de l'exode rural, c'est manifestement la féminisation croissante de l'offre de travail qui a marqué le plus l'évolution du marché du travail. Cette évolution structurelle est liée à l'interaction des facteurs socio-économiques, en l'occurrence, l'amélioration du niveau d'instruction, l'expansion des opportunités d'emploi dans le secteur tertiaire, l'augmentation des gains relatifs féminins conférant à la femme un rôle économique accru au sein du ménage. Entre 1960 et 2007, le taux de féminisation de l'offre globale de travail a plus que triplé. C'est en milieu urbain où l'offre de travail féminin a enregistré un rythme de croissance remarquablement élevé, dépassant celui des hommes.

La féminisation globale de l'offre de travail masque cependant des évolutions contrastées selon les groupes d'âge: un accès accru des femmes au marché du travail au niveau des groupes d'âge à forte activité, accompagné d'un rétrécissement aux âges extrêmes[10].

L'effet de rétention scolaire sur l'activité économique féminine n'a été ressenti en fait qu'à partir de la décennie soixante-dix, représentée par la baisse tendancielle des taux d'activité des jeunes femmes de 15 à 24 ans, observée sur la période 1976-2002, passant de 19,5% à 8,2% chez les jeunes filles âgées de 15 à 19 ans. Comme pour les jeunes femmes, le taux d'activité des femmes de 50 ans ou plus connaît une baisse continue, passant de 12,9% à 3,3% entre 1976 et 2004.

Les femmes représentent 25,4% de l'ensemble de la population active et leur taux brut d'activité est estimé à 18,2% contre 54,1% pour les hommes. Cette participation féminine à l'activité économique diffère largement d'un milieu de résidence à l'autre. Ainsi, le taux brut d'activité des femmes rurales atteint 22,9% contre seulement 14,7% chez les citadines. Cet écart explique bien évidemment le taux d'activité relativement élevé (39,6%) enregistré en milieu rural, alors qu'il ne dépasse pas les 33,4% en milieu urbain. Le taux d'activité, pour la population âgée de 15 ans et plus, s'élève à 50,7% (77,3% chez les hommes contre 24,9%) chez les femmes.

Composition par âge: une population active à dominante jeune

Le poids important de la jeunesse est l'un des principaux traits qui caractérisent la structure et l'évolution de la population active. Ce sont ainsi 41,7% de l'ensemble des actifs qui, en 2007, sont

10 L'effet de rétention scolaire sur l'activité économique féminine n'a été ressenti en fait qu'à partir de la décennie soixante-dix, représentée par la baisse tendancielle des taux d'activité des jeunes femmes de 15 à 24 ans, observée sur la période 1976-2002, passant de 19,5% à 8,2% chez les jeunes filles âgées de 15 à 19 ans. Comme pour les jeunes femmes, le taux d'activité des femmes de 50 ans ou plus connaît une baisse continue, passant de 12,9% à 3,3% entre 1976 et 2003, chez celles âgées de soixante ans et plus, accompagnée d'une régression de ceux des tranches de 55-59 ans (de 23,2 à 10,5%) et de 50 à 54 ans (de 22,9% à 14,1%) pendant la période 1971-2002.

âgés de 15 à 24 ans. Si on élargit la catégorie des jeunes à l'ensemble des 15-34 ans, les actifs représenteraient alors plus de la moitié de la population active totale (53,5%). Le taux d'activité de la population jeune (41,7% en 2007) est nettement plus faible que celui des autres tranches d'âge, en partie du fait de l'augmentation des taux de scolarisation. En revanche, les 25-34 ans enregistrent les taux d'activité les plus élevés (62,1% en 2007), notamment à cause de l'allongement de la scolarité des jeunes qui, pour une partie d'entre eux, n'accèdent plus au marché du travail qu'après avoir dépassé les 24 ans.

1.2 Tableau. Composition de la force de travail

		2007		
		Masculin	**Féminin**	**Total**
Population active (par âge) en 1000		8118150	3030223	**11148373**
	15-24	1801970	689266	**2491236**
	25-34	2314913	868864	**3183777**
	35-44	1793983	663989	**2457972**
	45-60	1711372	641258	**2352620**
	+ 60	495912	166846	**662758**
Population active (par niveau d'éducation) en 1000				
	Sans	2774233	1729533	**4503766**
	Primaire	3858069	701348	**4559417**
	Secondaire	863185	272812	**1135997**
	Université	622663	326530	**949193**

Mais ces taux cachent d'autres formes de disparités, entre milieu urbain et milieu rural et entre les deux sexes. Les taux d'activité sont ainsi beaucoup plus élevés en milieu rural qu'en milieu urbain (52,7% contre 32% en 2007). En 1996, le taux d'activité des jeunes hommes urbains était 2,2 fois plus élevé que celui des jeunes femmes urbaines, passant à 2,6 en 1999 et à 3,1 en 2007. En milieu rural, ce ratio passe de 2 en 1999 à 2,8 en 2007. C'est donc en milieu urbain que l'écart entre les deux sexes augmente le plus (presque deux fois plus rapidement si on se limite aux variations relatives entre 1999 et 2007: 18,9% en milieu rural et 36,4% en milieu urbain). Par ailleurs, la tendance à la baisse des taux d'activité ces dernières années se vérifie aussi bien pour les jeunes que pour les adultes quoique à moindre degré pour ces derniers (la tendance ayant été plutôt à la baisse légère de l'activité des hommes et à une lente hausse d'activité des femmes dans les années 1970 et 1980)[11].

Composition par niveau d'éducation: des progrès mais une faiblesse
Le Maroc a accompli des progrès en réduisant la part de la population analphabète active; toutefois, le niveau moyen d'éducation reste encore très faible, en particulier dans les zones rurales.

Ainsi, depuis 2007, 35,5 % de la population active n'ont pas d'éducation formelle et 75 % avaient fréquenté l'école à un niveau inférieur au secondaire. Il n'y a que 7,5 % des personnes dans la population active qui ont une éducation supérieure. Le problème est encore plus grave dans le cas

11 Ces remarques doivent être relativisées vu que les données disponibles sur le milieu rural surestiment, relativement la participation des femmes, en général, et des jeunes d'entre elles, en particulier. En effet, la participation des femmes, notamment en tant qu'aides familiales non rémunérées, fait gonfler la participation féminine en milieu rural.

des zones rurales où 55 % de la population active n'a pas d'éducation formelle et près de 90 % ont un niveau d'éducation inférieure au secondaire. Il n'y a que 1,2 % des personnes vivant en milieu rural qui ont un diplôme d'éducation supérieure. Parmi les nouveaux entrants dans la population active, la part des travailleurs qualifiés demeure faible, aux environs de 16%.

Examinés selon le diplôme obtenu le plus élevé, les taux d'activité des « sans diplômes », des diplômés de niveau moyen[12] et de ceux de niveau supérieur[13]. sont respectivement de 49,7%, 47,2% et 70,0%. Néanmoins, l'analyse de ces taux selon le sexe, révèle que les hommes ont des taux d'activité relativement supérieurs à ceux des femmes, et ce pour tous les niveaux de diplôme. Toutefois, plus le niveau de diplôme augmente, plus l'écart entre les taux d'activité des deux sexes s'atténue. Ainsi, ces écarts passent de 60,0 points pour les « sans diplômes », passant par 43,8 points pour les diplômes de niveau moyen, à 20,4 points pour les diplômés de niveau supérieur.

Composition de la population active employée

Sur une population totale de 30,2 millions au Maroc en 2007, 10,2 millions étaient employés, le travailleur typique étant un homme âgé de moins de 35 ans[14]. Les hommes représentent 72,6 % de la population employée. Près de 55 % des employés vivent dans les zones rurales. Dans les zones urbaines, la majorité de ceux qui travaillent ont entre 25 et 34 ans alors que dans les zones rurales, le groupe le plus large est composé d'individus entre 15 et 24 ans. Le taux d'emploi, mesuré par la part (en %) des actifs occupés adultes parmi la population totale âgée de 15 ans et plus, s'élève à 44,8%. Les taux d'emploi par groupes d'âges et par milieu de résidence, font apparaître des écarts entre les taux urbains et ruraux, notamment chez les jeunes âgés de moins de 20 ans et ceux âgés de 20 à 24 ans (soit respectivement 30,1 points et 27,6 points). L'importance des taux d'emploi ruraux chez ces jeunes est essentiellement due à la résultante, d'un côté, des taux réduits de scolarisation et d'un autre côté à la fréquence des phénomènes de l'emploi non rémunéré et de l'auto-emploi en milieu rural.

L'analyse de la structure de la population active occupée par âge montre que cette dernière se caractérise par sa jeunesse. En effet, en 2007, plus de la moitié (soit 52,9%) des actifs occupés sont âgés de moins de 35 ans. Cette proportion est encore plus importante dans les campagnes, puisqu'elle se fixe à 59,0%, contre 46,4% dans les villes.

Le niveau d'éducation générale des personnes employées au Maroc est très bas; par rapport à la composition des compétences de la population active, les travailleurs à faibles compétences sont surreprésentés. Ainsi, environ 70,5 % de tous les employés n'ont pas eu de diplôme de l'éducation primaire. Ce chiffre est de 87 % dans le cas des zones rurales! A l'autre bout du spectre, 6 % seulement de tous les employés ont un diplôme d'éducation supérieure. Les faibles niveaux de qualification semblent aller au-delà des secteurs traditionnels qui utilisent de la main d'œuvre non qualifiée. En fait, environ 51,5% des personnes employées dans les zones urbaines n'ont pas de certificat de l'enseignement primaire. Ceci signifie qu'un nombre substantiel de personnes employées dans les secteurs de l'industrie, du commerce, du transport, de la communication, de l'administration générale et du service public n'ont même pas terminé l'enseignement primaire. Ceci pose un défi majeur à la croissance de la productivité et au niveau de compétitivité de l'économie.

Dans les zones urbaines, la majorité des travailleurs sont des salariés alors que dans les zones rurales la majorité est occupée comme aides familiales non rémunérées. Le statut typique de l'emploi dans les zones urbaines est celui «d'employé salarié» représentant 60,7 % de l'emploi urbain. Par contre, le statut de travail typique dans les zones rurales est «aide familiale» représentant 53,1 % de tout l'emploi rural, en plus des 26,5% de travailleurs autonomes. Moins de

12 Certificats de l'enseignement fondamental et diplômes de qualification ou de spécialisation professionnelle.

13 Baccalauréats, diplômes de cadres moyens et diplômes de formation supérieure (facultés, grandes écoles et instituts).

14 Ces données ne prennent pas en compte les 311 milles travailleurs âgés de moins de 15 ans. 86,6% de ces enfants exercent en milieu rural, et 39,8% d'entre eux, sont de sexe féminin.

20% sont des travailleurs salariés. Les aides familiales ne reçoivent généralement pas de compensation monétaire directe. Une raison pour la forte prédominance de ce type d'occupation est qu'au Maroc l'agriculture demeure dans une large mesure confinée aux parcelles familiales.

Il se dégage de la ventilation de l'emploi selon les secteurs d'activité en 2007, que l'agriculture absorbe une part importante des actifs occupés surtout en milieu rural. En effet, ce secteur emploie 45,4% des actifs occupés au niveau national, et s'accapare la part du lion en zones rurales, avec 81,2% du total de l'emploi rural. Le secteur des « services » vient en deuxième place, avec 35,5% de l'emploi national. Dans les villes, cette proportion atteint 62,6%, contre 10,2% seulement dans les campagnes. Le secteur industriel n'emploie, quant à lui, que 13,3% de l'ensemble des actifs occupés au niveau national. Ce pourcentage assez modéré s'explique aussi par le faible poids qu'occupe ce secteur dans les campagnes (4,3%) contre 22,0% en milieu urbain. Quant au secteur du « bâtiment et travaux publics », il n'emploie de son côté que 6,8% de la population active occupée (9,6% dans les villes et 4,2% dans les campagnes).

La performance du secteur manufacturier en matière de création d'emplois a été faible en milieu urbain mais continue de dominer l'emploi urbain. Les créations d'emploi se concentrent dans le secteur des services et de la construction, alors qu'elles stagnent dans l'industrie. Parmi les emplois créés en milieu urbain entre 2000 et 2007, 95% l'on été dans le secteur des services et de la construction, et seulement 5% dans le secteur manufacturier. L'enquête annuelle du ministère de l'industrie confirme cette tendance et indique que l'emploi industriel connaît une quasi-stagnation depuis le début des années 2000. La croissance annuelle des effectifs est passée de 2,5% dans les années 90 à 0,5% entre 2000 et 2006. Les données collectées dans le cadre de l'enquête ICA font ressortir des évolutions sectorielles similaires. Durant la période 2002-2005, le taux de croissance médian de l'emploi dans les entreprises manufacturières a été de 4%, alors qu'il a atteint 10% dans les services et 21% dans le secteur du BTP.

La dynamique des élasticités emploi-croissance par secteur sont les déterminants clés des nouveaux emplois qui sont créés. L'expérience de la croissance au Maroc peut être divisée en trois périodes: 1982-1991, 1991-1998 et 1998-2004. La période 1982-1991 a été une période de forte croissance du PIB hors agriculture. Sur les 3,35% de croissance moyenne du PIB hors agriculture, 2,39% étaient expliqués par la croissance de la main d'œuvre. Entre 1991 et 1998, la croissance s'est ralentie et la croissance de la main d'œuvre n'a contribué que 1,66 % seulement au taux de croissance moyenne totale de 2,9%. Au cours de la dernière période, 1998-2004, la croissance moyenne était à son point le plus élevé (3,55% par an), mais le facteur travail n'a contribué qu'à 1,05 point de pourcentage seulement. La productivité totale des facteurs est devenue un moteur important de la croissance.

1.3 Tableau. Composition de l'emploi (2007)

		Masculin	Féminin	Total
Emploi (en 1000)		7324	2733	**10056**
	15-24	1480	582	**2063**
	25-34	1994	731	**2725**
	35-44	1693	621	**2314**
	45-59	1663	632	**2295**
	+ 60	493	166	**659**
Emploi (par niveau d'éducation) en 1000				
	Sans	2723	1739	**4462**
	Primaire	3511	670	**4182**
	Secondaire	708	203	**911**
	Universitaire	515	227	**742**
Emploi par activité en 1000				
	Agriculture, Pêche	2596	1639	**4235**
	Industrie	873	406	**1279**
	BTP	832	6	**839**
	Commerce, rest, hôtelerie	1484	153	**1637**
	Transport et com	372	30	**402**
	Banques, assurances	119	53	**172**
	Autres Services	637	352	**989**
	Administration	410	94	**504**
Emploi par secteur en 1000				
	Administration et CL	604	208	**812**
	Ets P et Semi Publics	82	13	**95**
	Entreprises Privées	6645	2255	**8899**
	Autres secteurs	56	89	**145**
Emploi par Statut				
	Salariés	3578	933	**4510**
	Indépendants	2161	346	**2508**
	Employeurs	217	157	**233**
	Aides Familiaux	1210	1416	**2627**
	Membres de coopérative, associé	150	17	**168**
	Autre	7	4	**11**

Parmi les secteurs hors agriculture, les contributions à la valeur ajoutée totale et l'emploi total ont été remarquablement stables. En termes de valeur ajoutée, la part de chaque secteur est restée pratiquement inchangée au cours des deux dernières décennies, à l'exception d'une chute de courte durée dans le secteur du commerce au cours des années 1990. En termes d'emploi, les principaux changements ont eu lieu dans le secteur industriel et dans l'administration publique, qui ont vu leurs contributions se réduire au cours de la dernière décennie.

Des élasticités emploi-production faibles et une croissance modeste ont réduit le nombre d'emplois créés dans tous les secteurs, en particulier dans l'industrie. Entre 1984 et 1990, la contribution du secteur industriel à tous les emplois urbains créés a été de 30,7 % (environ 336.000 emplois); il a été suivi par l'administration (27,8 %) et par le secteur du commerce (21,6 %). Au cours des années 90, une croissance plus lente et une plus faible élasticité emploi-production ont fait passer la contribution du secteur industriel à la troisième place (environ 12 % du total des emplois), derrière l'administration et le secteur du commerce. Il n'empêche que le secteur industriel a été en mesure de créer 110.000 emplois. Depuis 1998 toutefois, ce secteur industriel a éliminé environ 52.500 postes de travail. Donc, le secteur a eu une contribution négative d'environ 14,4 % de la création totale d'emplois.

Les pertes d'emploi dans le secteur industriel étaient concrètement concentrées dans les industries lourdes (mines, extraction de pétrole et de carbone, raffinage de pétrole, électricité et eau) dans lesquelles environ 75.000 emplois ont été perdus au cours des années 90. Dans les industries manufacturières, il y a eu quelques gains dans l'emploi, en particulier dans la branche de l'habillement. Globalement, la contribution des industries manufacturières a été de 48.301 emplois pour la période 91-97 et de 22.594 emplois pour la période 98-03. L'exception a été l'industrie des textiles qui a constamment éliminé des emplois depuis 91, chez les femmes en particulier (voir section suivante).

Dans le secteur manufacturier, le taux de création d'emplois tend à être plus élevé dans les branches où la valeur ajoutée par travailleur est plus faible et où la taille moyenne d'une entreprise est plus petite. En évaluant le taux de création d'emplois, la valeur ajoutée par travailleur et la taille moyenne de l'entreprise au niveau des branches économiques dans le secteur manufacturier, il est possible d'observer une certaine corrélation négative entre le taux de création d'emplois et la valeur ajoutée par travailleur sur la période 1991-2003. Une corrélation négative similaire est présente dans la relation entre le taux de la création d'emplois et la taille moyenne de l'entreprise au niveau des branches économiques dans le secteur manufacturier.

Mais l'on peut s'interroger sur la qualité des emplois créés, qui semblent aller, dans une large mesure, aux secteurs informel et agricole et bénéficier à des travailleurs faiblement qualifiés. Les enquêtes sur la population active montrent qu'environ 70 % de tous les nouveaux emplois depuis 1999 ont été créés dans les secteurs du commerce, de la construction et de l'agriculture. Généralement, ces secteurs ne sont pas de haute productivité/haute valeur ajoutée. De plus, la moitié des emplois dans l'agriculture sont pour des aides familiales non rémunérées et la grande majorité des emplois dans le secteur du commerce sont de nature informelle. Certains soutiennent que l'informalité est souvent un choix et que le secteur informel peut être tout aussi dynamique et productif que le secteur formel. Les faits observés au Maroc toutefois, ne corroborent pas nécessairement ce point de vue. Près de 77 % de ceux dans le secteur informel ont moins que l'éducation primaire et 90 % des unités informelles ont des ventes par année qui sont proches du salaire minimum. La majorité des emplois créés l'ont été pour les travailleurs à faibles qualifications. Par exemple, 90 % des emplois créés depuis l'an 2000 ont été destinés à des individus sans diplômes d'éducation supérieure.

Enfin, il y a des préoccupations concernant l'égalité des sexes, avec une majorité des emplois nouveaux nets qui vont aux hommes. Sur les six dernières années, les femmes ont obtenu un tiers des nouveaux emplois créés par l'économie. Toutefois, elles occupaient deux tiers des emplois détruits. Par conséquent, les femmes ont eu un gain net de seulement 4,8 % du total des emplois créés entre 1999 et 2005. Alors que de nouveaux secteurs dynamiques tels que les communications et les services financiers se développent, dans l'ensemble, l'emploi féminin continue à se concentrer dans les secteurs à faible valeur ajoutée (par exemple l'agriculture, où 62 % de l'emploi féminin est concentré).

Le secteur formel a été à l'origine de plus de la moitié des créations d'emplois. Selon les résultats de l'enquête ECI de 2008, environ 56% des nouveaux emplois créés entre 1994 et 2005 ont été pour des salariés. Les travailleurs indépendants et les travailleurs familiaux non rémunérés représentent la majorité de l'autre moitié des emplois créés.[15] Ce pourcentage représente un plafond: quoique les données disponibles ne permettent pas un examen plus détaillé, les entrevues qui se sont déroulées dans le cadre de l'enquête ECI indiquent que tous les salariés n'ont pas obtenu un contrat écrit ou bénéficié des avantages de la sécurité sociale.

Le secteur informel contribue lui aussi de manière importante à l'emploi total au Maroc. Ainsi, environ 39 % de l'emploi total non agricole, ou 1,9 million d'emplois, provenaient des unités de production du secteur informel. Le commerce est le secteur qui a le plus recours à l'emploi informel. Ainsi, 91,2 % de l'emploi dans le commerce est de nature informelle. Par conséquent, le commerce prend la plus grande part de tout l'emploi non agricole du secteur informel avec 48,2 % suivi par le secteur industriel (25 %) et par les services (19,8%).

La croissance de l'emploi dans le secteur formel a été partiellement associée à la dynamique des exportations manufacturières[16]. Selon les données de l'Enquête annuelle auprès des entreprises réalisée par le Ministère de l'Industrie à la fin des années 80, les exportations manufacturières marocaines ont enregistré des taux de croissance très élevés, accompagnés de taux de croissance élevé de l'emploi permanent et temporaire. Lorsque la croissance des exportations manufacturières s'est ralentie dans les années 90, il en a été de même pour l'emploi. Alors que la croissance des emplois permanents a reflété le ralentissement de la croissance des exportations, les changements négatifs dans l'emploi temporaire ont permis aux entreprises de s'ajuster.

Le nombre d'emplois crées par les entreprises marocaines est insuffisant pour résorber le niveau élevé du chômage et accueillir les nouveaux entrants sur le marché du travail.

La demande de travail entre le secteur public et le secteur privé a également subi une modification importante. Depuis l'indépendance jusqu'au début des années quatre ving-dix, l'emploi dans le secteur public a connu une croissance soutenue. La part de l'administration dans l'emploi est passée de 7% en 1960 à 12,9% en 1994, et baisser à 9,2% en 2007, suite aux restrictions des postes budgétaires. L'examen de la structure de la population active occupée adulte par secteur d'emploi montre qu'actuellement, au niveau national, le secteur privé emploie à lui seul 88,4% du total de la population active occupée nationale (78,6% en milieu urbain et 98,0% en milieu rural). Environ 91,3% de la main d'œuvre nationale, exerçant dans le secteur public, résident dans les villes.

Entre 2000 et 2007, environ 660 000 emplois ont été crées en milieu urbain, soit en moyenne 100 000 emplois par an[17]. D'ici à 2020, les projections suggèrent que ce nombre devrait plus que doubler pour résorber le chômage existant et offrir des opportunités aux nouveaux entrants sur le marché de l'emploi[18]. Bien que le taux de chômage urbain ait baissé ces dernières années, il reste supérieur à 15% pour l'ensemble des actifs et dépasse 30% pour les jeunes diplômés. Cette amélioration a été facilitée par une réduction tendancielle du taux d'activité, qui est passé de 50 en 1996 à 44.8% en 2006. De nombreux chômeurs sont sortis de la population active par découragement, ou ont retardé leur entrée sur le marché de l'emploi. La réduction récente du taux de chômage n'offre donc qu'une image partielle de la performance du marché du travail. Le taux d'emploi, mesurant la part des personnes employées dans la population de plus de 15 ans, révèle une situation plus préoccupante. En milieu urbain, il est estimé à 38% en 2006, alors qu'il était supérieur à 40% dans les années 90.

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15 Enquête sur le Climat de l'Investissement. Document Banque Mondiale. Mai 2008.

16 Les données désagrégées à deux chiffres permettent une comparaison par sous-secteur au sein du secteur manufacturier. Les sous-secteurs les plus dynamiques ont été ceux de la machinerie et de l'équipement électrique, suivi par les métaux, les meubles, et l'habillement. Ces sous-secteurs, à l'exception de l'habillement, ont commencé avec de très faibles volumes d'exportation et, en dépit de leur dynamisme, leur poids total en termes d'emplois demeure modeste. Le sous-secteur du textile traditionnellement fort a enregistré un net recul au cours de la période en termes de la croissance des exportations et de l'emploi.

17 Enquête emploi, HCP

18 Pour accueillir les nouveaux entrants sur le marché du travail, l'économie marocaine (rural et urbain) devra créer plus de 3,5 millions d'emplois d'ici à 2020, soit plus de 233000 emplois par an. On estime que l'essentiel des créations d'emplois devra se faire en milieu urbain en raison de l'accélération prévisible de l'exode rural.

1.3 Estimation des besoins de création d'emploi

Les taux de participation à la population active au Maroc sont très élevés pour les hommes et très faibles pour les femmes. Les taux de participation à la population active masculine sont de 81,8 % et de 92,7 % dans les tranches d'âge 15-59 ans et 25-59 ans respectivement. Ces taux ne sont pas viables si le niveau d'éducation moyen augmente, retardant ainsi l'entrée sur le marché du travail. A l'autre extrême, les taux de participation de la population féminine dans les mêmes tranches d'âge ne sont que de 29,9 % et 33,1 %. Ceci se traduit par des taux de participation globaux de 55,5 % dans la tranche d'âge 15-59 et de 62 % dans la tranche d'âge 25-59 ans. Les taux sont inférieurs aux moyennes observées dans la plupart des régions du monde.

Les taux de participation à la population active sont plus élevés dans les zones rurales, en raison d'une participation plus forte parmi les femmes et les personnes âgées. Le taux de participation pour la tranche d'âge 15-59 ans est de 64,2 % dans les zones rurales par rapport à 49,2% dans les zones urbaines. Alors que les taux de participation pour les hommes sont similaires entre zones urbaines et rurales, les taux de participation féminine sont pratiquement le double dans les zones rurales (46,1 pour cent contre 24,4 %). Plusieurs raisons pourraient expliquer ce phénomène, y compris une discrimination moindre sur les marchés ruraux; mais plus important encore des revenus des ménages plus faibles et une forte prévalence du travail familial non rémunéré qui caractérise la production agricole. Le fait que les taux de participation féminine soient plus élevés chez les jeunes indique également un plus faible niveau scolaire. Il est important de noter aussi que dans les zones rurales les individus ont également tendance à travailler plus longtemps ce que pourrait s'expliquer par le manque d'accès à la sécurité sociale. Ainsi, 50 % des individus âgés de plus de 60 ans participent à la population active dans les zones rurales à comparer à 25% ou moins dans les zones urbaines.

Dans l'avenir, la dynamique du marché du travail dépendra, en grande partie, de la vitesse à laquelle augmentent les taux de participation des femmes. Le taux de participation de la main-d'œuvre féminine a temporairement chuté entre 2000 et 2002. Le phénomène est difficile à expliquer, mais il semble être lié à des problèmes de mesure concernant l'activité et l'emploi dans le secteur agricole. Les taux de participation féminine sont de nouveau à la hausse, cela tient à la diminution des taux de fertilité et à l'amélioration de l'éducation des jeunes filles. Dans le cas du Maroc, une étude récente sur les déterminants des taux de participation féminine confirme l'importance de l'état matrimonial, la taille du ménage, l'éducation et l'âge. Ainsi, pendant que les taux de fertilité diminuent et que les réalisations scolaires augmentent, les taux de participation féminine devraient augmenter. Mais l'écart entre le Maroc et la moyenne des régions plus ou moins développées du monde devrait rester important jusqu'en 2020.

Dans le scénario en référence qui assume une augmentation modérée des taux de participation féminine, le taux de croissance de la population active devrait baisser même s'il reste élevé par rapport à d'autres régions. Le taux actuel de croissance annuelle de 2% de la population active âgée de 25-59 ans devrait baisser à environ 1% en 2020. La principale raison est la chute dans la part de la population en âge de travailler, qui au cours des années 80 et 90 expliquait 30% de la croissance de la population active. A l'avenir, ce sont le taux de croissance de la population totale et l'augmentation des taux de participation qui contribueront principalement à la croissance de la population active. Donc, si les taux de participation féminine augmentent plus rapidement que dans le scénario de référence, par exemple, s'ils convergent vers les niveaux actuels de l'OCDE d'ici 2040, alors le taux de croissance de la population active pour la période 2008-2015 serait de 2,5 % au lieu de 1,7 %. Dans tous les cas, la croissance de la population active au Maroc durant la période 2008-2015 et la période 2015-2020 devrait rester plus élevée que dans d'autres régions du monde.

Tableau 1.4: Estimation des besoins en création d'emploi

		Population active 2007	Population active occupée 2007	Besoins 2015	Besoins 2020	Besoins par an
Nombre (taux activité: 55,5)		11148	10056	11330	12397	**180**
79,1	**Homme**	8118	7324	7996	8855	**118**
30,8	**Femme**	3030	2732	3334	3542	**62**
5% de plus pour taux activité femme		11148	10056	11920	13020	**228**
	Homme	8118	7324	7996	8855	**118**
	Femme	3030	2732	3924	4165	**110**

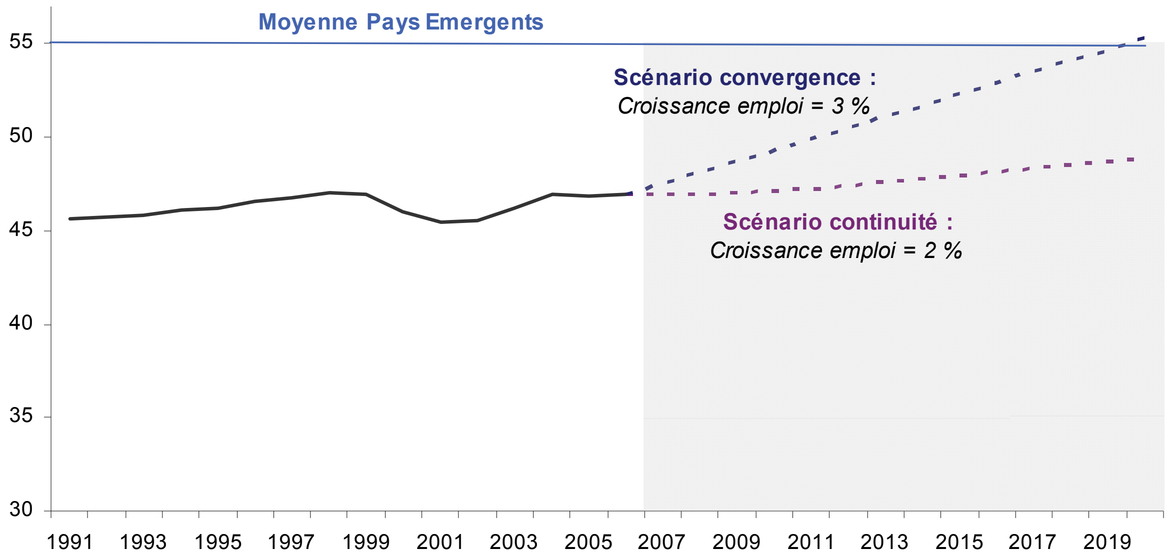
En termes d'impact sur le marché du travail, les projections de la population active sur la base des taux d'activité enregistrés en 2007 (55,5% pour les deux sexes, dont 79,1 pour les hommes et 30,8 pour les femmes) impliquent le besoin de créer 2.341.000 emplois nouveaux d'ici 2020. Entre 2007 et 2020, il y aura en moyenne 180.000 nouveaux entrants nets sur le marché du travail chaque année. Plus de 90 % de tous les nouveaux entrants auront entre 15 et 25 ans. Si le taux d'activité des femmes s'améliore de 5%, le Maroc aurait besoin de créer environ 2.964.000 d'emplois d'ici 2020. Il s'agit là d'une moyenne de 228.000 emplois par année; alors que dans les années qui ont précédé 2006, le nombre d'emplois créés chaque année ne dépassait pas 190.000.

Le taux d'emploi au Maroc est particulièrement faible au regard de l'expérience internationale. La population employée au Maroc ne représente que 46% de la population âgée de 15 ans et plus (37.8% en milieu urbain). Dans les pays émergents, cet indicateur s'établit en moyenne à 55%. Le taux d'emploi au Maroc se situe globalement au même niveau qu'en Turquie et en Tunisie. Néanmoins, cette comparaison est biaisée par l'importance du milieu rural au Maroc[19]. Celui-ci se caractérise par un taux d'emploi nettement plus élevé qu'en milieu urbain, et par une structure dominée par l'emploi non rémunéré (les aides familiales représentent plus de 50% de l'emploi rural). En corrigeant ce biais, il apparaît que le taux d'emploi au Maroc est l'un des plus faibles des pays émergents. Cette situation s'explique principalement par la faible participation des femmes dans le marché du travail.

Une accélération significative de la croissance économique est nécessaire pour initier un processus de convergence. Pour que le taux d'emploi (47% actuellement) rejoigne le niveau moyen des pays émergents à l'horizon 2020 (55%), il faudrait que la croissance de l'emploi atteigne environ 3% en moyenne, alors qu'elle n'est que de 2% actuellement.

19 L'emploi rural représente 50 % de l'emploi total au Maroc, contre 30 % en Turquie et en Tunisie.

Graphique. Taux d'emploi au Maroc (Emploi/ population de 15 ans et plus)



Source: OIT, Indicateurs clés du marché du travail; tableau figurant dans le rapport de la Banque Mondial sur le Climat des Affaires. Maroc. 2008.

Une analyse économique à moyen terme conduite par le HCP a abouti à la construction de trois scénarios structurant les stratégies et les options pour le développement économique et social à l'horizon 2015. Le premier scénario, intitulé scénario de l'émergence, s'appuie sur les réformes économiques et la valorisation du capital humain. Il constitue la voie privilégiée vers un développement humain durable. Les deux autres scénarios, tout en restant envisageables donnerait l'un la priorité à l'efficience économique à travers des réformes accélérées, mais avec un développement social moins avancé; l'autre serait celui de l'essoufflement de la dynamique de développement actuelle.

Le scénario de l'émergence dégage un taux de croissance économique de l'ordre de 5,5% avec une accélération en fin de période (6,3% durant 2011-2015). Le taux de chômage reste élevé au début de cette période mais emprunterait une tendance à la baisse vers la fin de cette période pour se situer à moins de 10% en 2015 et à des niveaux inférieurs au-delà de cet horizon, grâce à l'effet de durabilité de la croissance.

Dans le scénario de l'efficience économique prioritaire, la croissance économique pourrait se situer à près de 6,4% en moyenne annuelle durant cette période. Cette croissance serait accompagnée, ainsi, de fortes tensions sur le marché de l'emploi pour la main d'œuvre non qualifiée et partant d'une faible diffusion des fruits de la croissance. En effet, les activités traditionnelles, laissées à la marge du développement, libéreraient fortement la main d'œuvre banale. Les pertes d'emplois pour les actifs de faible niveau de formation ne seraient pas compensées par la création d'emplois qualifiés induite par le développement des activités modernes.

De manière générale, ce scénario se traduirait par des créations nettes d'emploi légèrement inférieures à la moyenne de 200 milles emplois par an, observée durant les années antérieures, ce qui serait insuffisant pour répondre à une demande additionnelle en augmentation continue sous l'effet de la transition démographique.

Dans ce scénario de l'essoufflement, la dynamique actuelle risque, si elle n'est pas confortée par des réformes économiques efficientes et bien agencées, de connaître une inflexion dans le futur. Sur le plan économique, ce scénario est sous-tendu par la poursuite des chantiers structurants déjà entamés en matière d'infrastructures économiques. Malgré ce dynamisme, la croissance économique qui en découlerait est limitée, de près de 4% au début de la période 2007-2015, et suivie d'une décélération vers la fin en raison de l'essoufflement qui risque d'être engendré par les rigidités aux réformes de fond. En conséquence, le taux de chômage national se maintiendrait au-delà de 17%.

Tableau 1.5: Résultats comparés de trois scénarios

Indicateurs	**Scénario 1: Ouverture et Emergence**	**Scénario 2: Efficience économique prioritaire**	**Scénario 3: Essoufflement**
Croissance économique (en moyenne annuelle)	**5,5**	**6,4**	**4,0**
Chômage en 2015	**10,0**	**16,3**	**17,1**
Taux de pauvreté 2015	**8,0**	**17,0**	**12,0**

2. Les performances du marché du travail

Historiquement, le travail au Maroc n'a été régi à ses débuts que par quelques dispositions du code des obligations et des contrats notamment en ce qui concerne la formation et la résiliation des contrats du travail et par l'usage. Ce n'est qu'à partir de 1926 qu'il y a eu élaboration progressive d'une législation moderne justifiée par le développement industriel que le Maroc a commencé à connaître. Ce processus d'élaboration et d'amélioration de la législation a été poursuivi après l'indépendance. L'analyse du contenu du code de travail dont le renouvellement a duré plus de deux décennies révèle que beaucoup de dispositions des normes internationales y ont été intégrées.

2.1. La régulation du marché du travail

L'adhésion aux conventions internationales

Le Maroc a pris divers engagements internationaux pour protéger les droits fondamentaux des travailleurs. Bien que l'on ait noté un certain progrès, les intérêts économiques continuent d'être utilisés comme argument pour réduire les protections sociales comme les droits des travailleurs. Toutefois, une évolution positive a été observée avec l'adoption du nouveau code de travail qui a intégré dans son contenu les diverses conventions internationales sur le droit du travail. Une importante harmonisation du code du travail avec les apports du droit international a eu lieu, notamment après l'adoption par l'OIT en 1998 de la déclaration relative aux principes et droits fondamentaux du travail et son suivi. L'objectif était d'assurer un accompagnement social de la mondialisation par le respect d'un minimum de règles basées sur des principes et des valeurs communes. Le Maroc a ratifié plusieurs conventions de l'OIT sur le droit du travail (liberté syndicale, droit de grève, négociations collectives, égalité de rémunération et discrimination dans l'emploi, travail des enfants....) Dans plusieurs entreprises, ces droits ne sont pas respectés

Principaux acteurs et négociation collective

Les lois et règlements en vigueur au Maroc consacrent depuis 1957 déjà, le pluralisme syndical et la liberté syndicale. Quatre centrales syndicales (sur 17 existantes) dominent le paysage syndical national: l'Union marocaine du travail (UMT), l'Union générale des travailleurs du Maroc (UGTM), la Confédération démocratique du travail (CDT) et la Fédération démocratique du Travail (FDT). Ils tirent leur pouvoir de négociation de la relation très étroite qu'ils ont avec les partis politiques, un héritage de leur implication dans la lutte pour l'indépendance[20].

Les données relatives à l'effectif d'adhérents sont à la fois approximatives et difficiles à vérifier: entre 200 000 et 1 million, soit un taux d'adhésion (adhérents /population syndicale) variant entre 6,7 et 33%. Les secteurs couverts par l'action syndicale sont le secteur privé formel (1,2 million de salariés employés dans 75 00 entreprises inscrites à la CNSS), 120 000 salariés dans les entreprises publiques et 840 000 travaillant dans la fonction publique. Le nombre de salariés « touchés » par le syndicalisme est estimé à quelque trois millions sur une population active occupée de près de 9 millions de travailleurs, soit un taux de syndicalisation de l'ordre de 33%.

Les syndicats sont très actifs et leur pouvoir de négociation est important aussi bien au niveau du secteur public qu'au niveau du secteur privé formel. En particulier, ils jouent un rôle très actif dans l'exécution des différentes conventions collectives en vigueur dans des secteurs spécifiques (banques, transport), mais aussi dans la formulation du corpus des règles du travail dans l'administration et les entreprises publiques. Cette action collective crée une situation duale, à savoir que les travailleurs dans n'importe lequel des secteurs syndiqués sont protégés alors que les autres secteurs sont soumis aux forces du marché.

L'étude des données couvrant la période 1995-2007 sur la conflictualité sociale sous ses diverses formes permet de se faire une idée sur la nature du climat social au Maroc[21]. D'abord les conflits collectifs qui ont donné lieu à des grèves s'élèvent en moyenne à 1368 grèves par an. Les grèves déclenchées ont enregistré un taux de progression annuel moyen de 6,4%. Le nombre cumulé d'établissements concernés par les grèves déclenchées dans cette période est en progression de 6,8% par an. Ensuite, le nombre de conflits individuels enregistré dans cette période est en progression annuelle de 2,3%. **Les conflits collectifs du travail** ont connu une évolution à la fois quantitative et qualitative. Les formes violentes ont cessé. Ces conflits se répartissant à raison de 71% dans l'industrie et 29% dans le commerce et service. Leur motif consiste essentiellement en la non application de la législation du travail: le licenciements -préavis (27,11%), les congés payés (25,15%), les conflits liés aux salaires (22,9%), les problèmes liés à la Caisse Nationale de la Sécurité Sociale (7%), les repos hebdomadaires (3%), l'horaire du travail (2%) et les questions de disciplines (2%). Près de 60% de ces conflits sont réglés à l'amiable par l'inspection du travail. Le code du travail a institué les procédures de leur règlement. Beaucoup de conflits peuvent être évités par le renforcement du contrôle de l'application de la législation du travail.

La loi prévoit un cadre juridique et institutionnel de la négociation collective comme prolongement naturel du dispositif sur la convention collective**.** Toutefois, et en dépit de l'existence des éléments du droit de la négociation et d'un cadre institutionnel, la régulation du marché du travail par le biais des négociations collectives est presque inexistante. En atteste le faible nombre de conventions collectives conclues depuis 1958 jusqu'à nos jours qui n'est que de 37 (dont 24 entre 1958 et 1965; 5 au cours de la décennie quatre-vingt; 4 au cours des années quatre vingt dix et 3 entre 2000 et 2005).

Dans le secteur privé, les intérêts professionnels des salariés sont pris en charge par l'institution des délégués du personnel élus et par les membres des commissions du statut (entreprises industrielles

20 L'indicateur de représentativité est fourni par les résultats obtenus aux élections des délégués du personnel, de la commission du statut du secteur minier, des commissions paritaires et des représentants du personnel des établissements publics de 2005: la CDT (19,5% des élus), l'UMT (18,9%), l'UGTM (7,49%) et la FDT (6,71%), contre 43,8% de « sans appartenance syndicale ». Le ratio électeurs/élus fait apparaître une déformation défavorable au secteur privé. En termes de députés élus par les grands électeurs (délégués du personnel des secteurs privé et du public) à la Chambre des Conseillers (composée pour 2/5e par les représentants des syndicats et du patronat), la CDT arrive en tête suivie de l'UMT et de l'UGTM.

21 Etude du Centre Marocain de Conjoncture sur la bae des informations receuillis auprès de la Direction du Travail relevant du Ministère de l'Emploi au Maroc. Lettre du CMC no 190. Avril 2008.

et commerciales, entreprises opérant dans le secteur minier). Cette représentation professionnelle élue coexiste avec la représentation syndicale[22].

L'action syndicale a connu, dans ces dernières années, des difficultés liées à la montée du chômage, notamment dans le milieu urbain. En effet, l'instabilité de la relation d'emploi, à l'origine d'une diminution de l'engagement des salariés dans les conflits de travail, n'a pas manqué de réorienter l'action des syndicats et de recentrer leurs revendications autour de la préservation de l'emploi.

L'intermédiation sur le marché du travail

L'intermédiation en tant que mission principale confiée au service public de l'emploi s'est substituée au placement effectué par les anciens bureaux de placement. Cette intermédiation est effectuée par le service public et par les agences de recrutements privées. Ainsi, avec la suppression du monopole du placement, l'intermédiation peut être effectuée par le service public de l'emploi, l'agent d recrutement privé, l'agence du travail temporaire. L'intermédiation par le service public de l'emploi et confiée à l'ANAPEC.

Le rôle de l'Etat dans l'organisation et la coordination du marché du travail a été, depuis l'Indépendance, prépondérant, les services publics ayant juridiquement le monopole de « placement ». A partir de la fin des années 1970, l'action publique va enregistrer un recul progressif, accentué par l'archaïsme des dispositifs et des mécanismes d'intermédiation eu égard aux mutations profondes du marché du travail. La pression exercée par la montée du chômage, notamment des jeunes impose une réhabilitation de la responsabilité des pouvoirs publics et une ré-institutionnalisation des mécanismes de régulation du marché du travail.

Le constat de carence des mécanismes traditionnels, spontanés et « libres » de gestion du marché du travail ont été à l'origine de la création de l'Agence nationale de Promotion de l'Emploi et des Compétences (ANAPEC)[23]. Il s'agit d'une approche radicalement différente: d'une logique de placement, prévalente depuis les années 1960, on passe à une logique de coordination du marché du travail et d'activation des services publics d'intermédiation fondée sur une logique d'insertion combinant implication des jeunes en chômage dans la recherche d'emploi et aménagement par l'Etat des conditions d'amélioration de l'employabilité des jeunes.

La base de données de l'ANAPEC compte actuellement plus de 350 000 chercheurs d'emploi dont 37% ont une date d'actualisation de moins d'un an. Les prévisions de l'Etat en matière d'insertion des chercheurs d'emploi à l'horizon 2008, s'élèvent à 200.000. La population ciblée, prioritairement, par l'insertion dans la vie active est celle des chercheurs d'emploi diplômés pour lesquels l'Etat a mis en place, après trois années de rupture 2003-2005, de nouvelles mesures de promotion de l'emploi[24].

Sur les prévisions d'insertion de 200.000 personnes à l'horizon 2008, on compte à fin décembre 2007, 105.000 insertions en emploi salarié, portées par l'ANAPEC et 90.000 insertions en auto emploi, générées par la création de petites entreprises et portées par différents intervenants dans le cadre du Programme National d'Appui à la Création d'Entreprises MOKAWALATI. L'évolution prévue des insertions générées par l'auto emploi (46%) est sensiblement égale, en 2006 – 2008, à celle de l'emploi salarié (53.85)

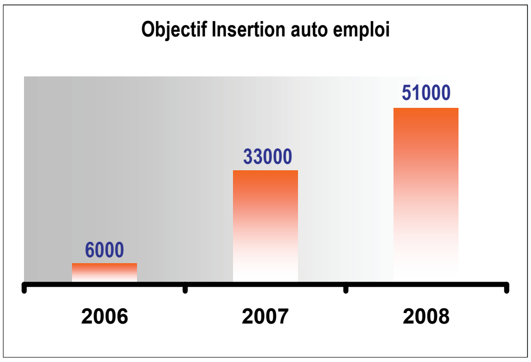
22 Cette représentation professionnelle élue est instituée dans les entreprises industrielles et commerciales, dans les professions libérales ainsi que dans tous les syndicats professionnelles, associations, sociétés civiles et groupements de quelque nature que se soit, employant au moins dix salariés. Cette institution est également prévue pour le secteur agricole mais son entrée en vigueur est subordonnée à l'adoption d'un décret d'application qui jusqu'à présent n'a pas été adopté. Ces délégués remplissent aux principales fonctions: la représentation des intérêts des travailleurs au sein des entreprises; ensuite ces délégués élisent leur représentants syndicaux à la deuxième chambre.

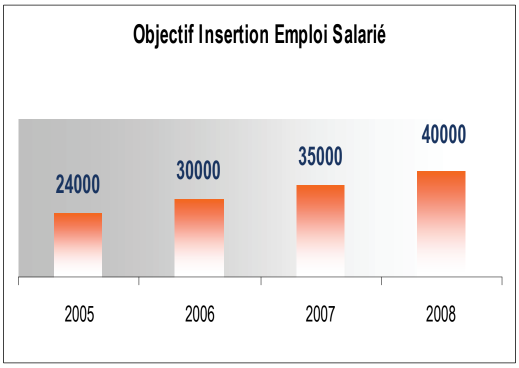
23 L'ANAPEC a été créée en juin-juillet 2000 (loi et décret d'application) et mise en place en 2001. L'ANAPEC compte aujourd'hui 24 agences, dont 15 implantées dans les chefs-lieu des régions.

24 Il s'agit de trois principaux programmes lancés en 2006: IDMAJ, TAEHIL et MOUKAWALATI.

La reconnaissance, par le Code du travail, de l'intermédiation privée est un facteur qui plaide en faveur d'une coordination de l'intervention des acteurs du marché du travail. S'agissant des agences de l'emploi privées, ce besoin est d'autant plus grand qu'elles vont pour certaines d'entre elles inévitablement se positionner sur le segment du marché du travail des emplois qualifiés auquel est dédiée l'ANAPEC. La question de la coopération entre l'ANAPEC et les Agences privées se posera avec une force grandissante au fur et à mesure que ces dernières s'installeront durablement et efficacement dans le paysage institutionnel de l'intermédiation sur le marché du travail.

Graphique 2.1. Objectifs d'insertion auto-emploi et emploi salarié





La réglementation du salaire minimum

Le Maroc a adopté dès 1936 une législation sur le salaire minimum qui détermine différents niveaux de salaire pour les marchés du travail urbain et rural, et pour différentes catégories d'âge. Indexé sur les évolutions de l'indice des prix depuis 1959, le salaire minimum fut scindé en deux composantes sectorielles en 1962: le Smag (salaire minimum agricole garanti) et le Smig (salaire minimum interprofessionnel garanti) applicables respectivement à l'agriculture et aux autres secteurs d'activité[25]. Dans la pratique, les révisions sont cependant irrégulières et plutôt indépendantes de cette règle d'indexation. En effet, elles sont généralement le résultat de décisions politiques et discrétionnaires à la suite de pressions syndicales importantes. Les quelques études disponibles suggèrent que la réglementation du salaire minimum urbain (qui concerne principalement les travailleurs non qualifiés) est généralement respectée dans le secteur privé formel grâce à un rôle actif de l'administration et des syndicats.

La segmentation du marché du travail est très prononcée. Au sein des secteurs d'activité économique on peut observer cinq niveaux et mécanismes de formation des salaires: l'administration centrale, les entreprises publiques, le secteur privé disposant de capacité de négociations collectives, le secteur privé dépourvu de ces capacités et le secteur informel qui opère avec des normes difficiles à identifier et où les normes réglementaires ne sont pas observées. Ces mécanismes influencent le fonctionnement de deux compartiments distincts du marché du travail.

En plus de la réglementation sur le salaire minimum et de la législation sur le licenciement, de nombreuses contributions sociales obligatoires existent et affectent la fonction de demande de travail du secteur privé. Dans le secteur industriel formel privé, mis à part l'impôt sur le revenu, les coûts non salariaux du travail représentent environ 24% du coût total de la force de travail.

25 Entre ces deux variantes, il existe deux différences essentielles: alors que le Smag est fixé au niveau de la journée du travail, le Smig est un taux horaire. De plus le Smag est d'un montant inférieur au Smig. A la faveur de l'augmentation de 10% décidée en avril 2003, la journée du travail payée au Smig est de 77,26 dhs à raison de 8 heurs de travail par jour, contre 50 dhs, pour la journée de travail payée au Smag, soit une différence de 35%.

Donc, pour un travailleur dans le secteur privé formel, il y a un écart important entre le salaire brut et le revenu net. D'après le cadre réglementaire actuel, les employeurs paient environ 18,6% du salaire brut à la sécurité sociale (CNSS) pour les contributions à la retraite et d'autres couvertures sociales. Il y aussi une taxe obligatoire de 1,6% sur la masse salariale d'une entreprise pour contribuer au financement du système public de formation professionnelle.

L'employeur est aussi responsable de la sécurité de ses employés − accident du travail et maladie professionnelle — et il doit souscrire à une assurance spécifique pour couvrir ces risques. Le coût varie entre 1% et 3% du montant total des salaires. De plus, le secteur privé formel souscrit souvent une assurance maladie à ses employés car elle n'est pas incluse dans le système de sécurité sociale actuelle. Le coût de ces assurances maladie privée varie entre 2% et 4% du montant total des salaires. Enfin, le plan de retraite obligatoire offert par la Sécurité Sociale a conduit plusieurs entreprises à souscrire à des plans d'épargne additionnelle. En général, le coût de ces plans complémentaires représente 12% du montant total des salaires. Souvent, le coût des couvertures-santé et des plans de retraite est partagé d'une façon égalitaire entre l'employeur et l'employé.

Il est utile de noter que la CNSS ne fournit aucune indemnité de chômage. Comme dans la plupart des pays en voie de développement, aucun plan d'indemnité de chômage n'existe au Maroc. Le remplacement des réglementations de licenciement coercitif et les onéreuses indemnités de licenciement par un schéma d'indemnité de chômage pourrait améliorer le fonctionnement du marché du travail urbain.

Les différences dans les mécanismes de formation des salaires conduisent à une différenciation des salaires pour des niveaux de formation et d'expériences similaires. Les travailleurs ayant 12 ans et plus de niveau d'éducation et ayant moins de cinq ans d'expérience disposent des meilleurs salaires s'ils travaillent dans le secteur privé et s'ils sont couverts par des conventions collectives.

Il est une autre relation pertinente caractéristique de la problématique de l'emploi au Maroc: il s'agit de la relation coût du travail/emploi. Avec le processus d'ouverture de l'économie nationale sur l'extérieur, son intégration progressive au marché mondial et son arrimage à l'Europe avec l'accord d'association les acteurs économiques et les pouvoirs publics ont tendance à considérer que l'évolution des coûts salariaux unitaires risquent de provoquer des pertes d'emploi, notamment dans les secteurs les plus exposés à la concurrence, ceux qui connaissent une retard dans le processus d'accumulation du capital et qui exige des investissements de modernisation. Face aux multiples contraintes de la compétitivité, qu'elles concernent les fluctuations de la demande ou les changements technologiques, les employeurs seraient amenés à procéder à des ajustements d'effectifs et de la durée du travail.

Les seules données sur les salaires au Maroc proviennent du système de sécurité sociale. Ces indiquent une forte prévalence d'emplois faiblement payés et un accès très limité à la protection sociale. Même si ces données sont affectées par des problèmes de déclaration, elles donnent une idée sur la distribution du revenu qui semble être très compacte. La vaste majorité des travailleurs ont des revenus qui sont proches du salaire minimum.

Le salaire mensuel moyen des travailleurs affiliés à la CNSS atteint 3953 dirhams. Le salaire théorique aurait été de 2688 dirhams si les salariés étaient occupés toute la période de l'année. En effet, en 2007, le nombre moyen de mois déclarés à la CNSS se situe à 9,13 mois. Seuls 18% des salariés sont déclarés à la CNSS pour une période de 12 mois et 68% sont déclarés pour l'équivalent de 6 mois pleins et plus contre 17% des déclarés pour moins de trois mois pleins.

La structure des salaires par tranches selon le salaire mensuel moyen révèle que 41% des salariés touchent mois que le salaire minimum, 50% disposent d'un salaire d'un salaire variant entre le salaire minimum et trois fois le niveau de ce smig, et une minorité de salariés ont un revenu salarial supérieur à trois fois le salaire minimum. De plus, les données montrent que la plupart des personnes à la retraite ont accumulé des périodes courtes de contributions (20 ans en moyenne), ce qui dénote de longues périodes de chômage ou de travail dans le secteur informel.

En même temps, la couverture du système de sécurité sociale est tombée de 21 % de la population active en 2003 à 18,9 % en 2007. Ceci laisse entendre également qu'une majorité des emplois, y compris les emplois nouveaux, sont des emplois de « faible qualité » qui ne donnent pas accès aux mécanismes appropriés de protection du revenu.

Tableau 2.1: Effectifs des salariés affiliés à la CNSS et salaires distribués

Années	Effectifs	Masse salariale (Milliers de Dhs)	Salaire annuel moyen (en dhs)	Salaire mensuel moyen (en dhs)
2000	1284990	3788286	29018	2418
2001	1308383	39277727	30020	2502
2002	1484295	41176649	27742	2312
2003	1631755	42844206	26257	2188
2004	1592364	45264576	28426	2369
2005	1579406	50567487	32017	2668
2006	1614916	56183000	34790	2899
2007	1900000	61280000	32253	2688

Source: Caisse Nationale de la Sécurité Sociale

La plupart des entreprises affiliées à la CNSS sont de petite taille (de 1 à 10 emplois), celles qui dépassent les 500 employés ne représentent que 1% de l'effectif total. Mais celles-ci distribuent près de la moitié de la masse salariale annuelle. Les entreprises sont concentrées dans les servies (transport et communication (34% et 22% des salaires distribués), le commerce (respectivement 30% et 17%), les BTP (14% et 17%). Les entreprises industrielles représentent 1% du total des affiliés et participent à raison de 34% dans les salaires distribués.

Tableau 2.2: Structure des entreprises affiliées à la CNSS: 2006

Tailles	Effectif des entreprises (en %)	Salaires distribués (en %)
1 à 10	83	16
11 – 200	16	39
Plus de 500	1	45

Source: CNSS

Flexibilité et précarité du travail
La dynamique des activités donne lieu à des opérations incessantes de flux et de reflux au niveau des établissements. Bon nombre de ces unités dont l'activité est affectée par une basse conjoncture seront contraintes au mieux de réduire le rythme de leur activité. Au cours de la période sous revue, 1993-2007, la démographie des établissements telle qu'elle est décrite par les Indicateurs relatifs à

l'extension ou à la réduction d'activité font ressortir plusieurs faits marquants[26]. C'est ainsi que le nombre cumulé d'établissements en difficultés économiques s'élevait à 5744 à raison d'une moyenne annuelle de 383 établissements. Toutefois, au cours de cette même période, le nombre d'établissements ayant enregistré une expansion d'activité a largement a largement compensé celui de ceux en difficulté.

Les difficultés économiques rencontrées entre 1993 et 2007 ont poussé bon nombre d'entreprises à licencier ou à réduire la durée du travail. C'est ainsi que le nombre de personnes "affectées " suite à la fermeture de leurs entreprises ou conséquemment à des opérations de compression d'effectifs, ou encore touchées par la réduction de la durée du travail s'élève à 172.028 (à raison de 11.469 par an en moyenne) représentant 52% de l'effectif embauché total (330.696 personnes à raison d'une moyenne de 22046 par en moyenne).

Au cours de la même période, les établissements dont l'activité était florissante ont favorisé l'embauche de 395.925 personnes (à raison d'une moyenne de 26.395) se répartissant entre personnes embauchées au titre la réouverture et reprise de l'activité ou dans la foulée de la création de nouvelles unités, ou suite au rétablissement de la durée de travail.

Au total, le tissu productif semble éprouver des difficultés pour secréter des opportunités d'emploi en nombre suffisant pour compenser d'une part les destructions d'emploi et d'autre part pour satisfaire les demandes des nouveaux arrivants sur le marché du travail. Tel est donc le défi auquel sera confrontée l'économie nationale au cours des prochaines années.

La précarité du travail s'est développée. Divers indices le confirment: La part des travailleurs temporaires dans l'industrie manufacturière a augmenté entre 1999 et 2006, passant de 10 à 15% de l'emploi. La durée moyenne de leur contrat de travail était de 2,6 mois, permettant ainsi aux entreprises de rester en conformité avec la loi, qui limitait la durée et le renouvellement des contrats temporaires. Le renouvellement de la main d'œuvre n'est pas négligeable. En moyenne, 13% des travailleurs permanents ont travaillé moins d'une année pour leur employeur actuel.

Les entrées-sorties des salariés sur le marché du travail réglementé[27] se caractérisent par une hausse du taux de sortie dans ces dernières années. Si la longue période a été marquée par une stabilité du taux de sortie autour de 8%, la phase couvrant les années 1996-2005 s'est particularisée par une hausse du taux de sortie en passant à 13,4%, soit un doublement de ratio. Le mouvement de destruction des emplois dans l'industrie de transformation est assez prononcé, bien qu'il soit fluctuant. La période récente a connu une baisse sensible du taux de création nette d'emplois dans ce secteur, une baisse de 25,1% à 12%. Le taux de destruction d'emplois est plus élevé dans les entreprises où le taux d'investissement par emploi est faible et où les rémunérations sont élevées et une rotation de main d'œuvre élevée.

2.2 Analyse des salaires et du revenu national

Les données concernant les salaires sont rares au Maroc. Alors que le questionnaire de l'enquête sur l'emploi comporte des informations sur les salaires, il y a des problèmes quant à la qualité des données collectées et de ce fait les résultats ne sont pas publiés. Deux sources alternatives sont les données administratives des fonds de pension et l'enquête sur les ménages de 1998 – qui comprenait un module sur les revenus des ménages[28].

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26 Etablissements et emploi. Lettre mensuelle du CMC No 190. Avril 2008

27 Le marché du travail réglementé désigne ici les entreprises affiliées à la sécurité sociale.

28 La discussion dans cette section s'appuie sur les deux sources ainsi que sur deux études du Ministère de l'Emploi portant sur la relation entre prix et salaires et le rôle du salaire minimum.

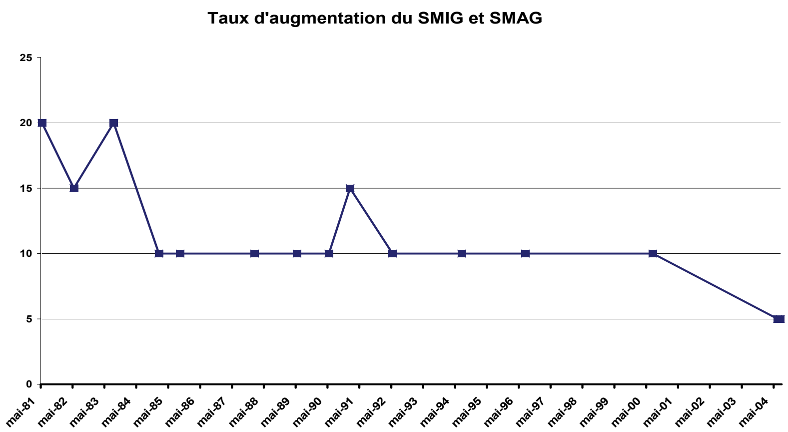
Le mécanisme d'ajustement du Salaire Minimum (SM) a été défini par une loi promulguée en 1959. Ce mécanisme ajuste le SM chaque fois que l'inflation excède 5% par rapport à la période de référence. Toutefois, en pratique, ce mécanisme n'est jamais entré en vigueur. En effet, les principales forces sous-jacentes aux décisions d'ajuster le SM ont été plutôt les pressions syndicales et politiques.

Sur une période de 35 ans (1971–2005), le SM a augmenté 21 fois à un taux moyen de 12,3% pour chaque augmentation. Ces ajustements ont fait suite à une pression intense des syndicats. La fréquence et l'étendu des augmentations du SM ont été la conséquence—et avaient pour but de mettre un frein—à la résistance aux mesures d'austérité adoptées à l'époque. Le SM a continué d'augmenter dans les années 90, mais à un taux plus lent et avec relativement moins de fréquence. Il a augmenté de plus de 68% à la suite de cinq ajustements. Dans les années 2000, le SM a augmenté deux fois de 5%, à la suite d'un accord conclu avec les syndicats et les associations d'employeurs dans le cadre des dialogues sociaux d'avril 2003. En conséquence, le SM nominal a augmenté de 7,2% par an au cours des 34 dernières années. Ceci est supérieur au taux annuel moyen de l'inflation de 5,8%. En termes réels, le SM réel a augmenté graduellement au cours des années 80 avant de stagner au cours de la plus grande partie des années 90 et de remonter modestement pendant les années 2000.

L'évolution du salaire minimum fait l'objet d'un débat politique interne intense. La question soujaccente à ce débat est de savoir si le SM n'est pas trop élevé et dans quelle mesure il affecte négativement la compétitivité du pays. En effet, son niveau est élevé lorsqu'on le compare à ses principaux concurrents. Le ratio du SM par rapport au salaire industriel moyen est relativement élevé au Maroc par rapport aux normes internationales. Alors que dans certains pays concurrents le SM représente moins de 40% des salaires industriels moyens, au Maroc il représente près de 50%. Deuxièmement, le ratio du SM par rapport au PIB par habitant se situe dans une fourchette de 30 à 150% pour le reste du monde, alors qu'il est de 160% au Maroc, soit supérieur à la valeur la plus élevée. Les deux ratios suggèrent que le SM est élevé.

Dans le secteur manufacturier, le ratio marocain Coût Unitaire de la Main d'œuvre (CUM) a augmenté régulièrement depuis 1988: le CUM est passé de 0,24 en 1988 à 0,49 en 2005. Dès lors, le salaire minimum marocain semble fixé à un niveau plus élevé que celui que l'économie peut se permettre en termes de compétitivité.

Graphique 2.2: Taux d'augmentation du SMIG et du SMAG



Dans ce débat, les enjeux les plus importants consistent à apprécier l'impact des augmentations du SM sur le niveau de l'emploi, la formation du salaire moyen, la structure des salaires, et la pauvreté.

- Du point de vue de l'incidence du SM sur l'emploi: Une étude réalisée par Agenor & El Aynaoui (2003) a établi une relation négative entre le salaire minimum et l'emploi: une réduction de 5% du salaire minimum réduirait le chômage parmi les travailleurs non qualifiés de 2,4 points de pourcentage. Une autre étude réalisée par la Direction de l'Emploi du Ministère de l'Emploi a conclu qu'un travailleur qui gagne le salaire minimum dans le secteur des textiles a une probabilité 4,7 fois supérieures aux travailleurs mieux payés de perdre son emploi.

- Du point de vue de l'incidence du SM sur la fixation du salaire moyen. La position relative du SM par rapport aux salaires moyens, modaux et médians du secteur privé souligne le rôle clé qu'il joue au Maroc. Selon les données de la CNSS, le SM correspond au salaire modal dans le secteur privé formel et en tant que tel il représente le taux salarial le plus fréquent obtenu par les employés. Il correspond aussi à 58% du salaire moyen et à 109% du salaire médian
- Du point de vue de l'incidence du SM sur la structure des salaires. Les résultats d'une étude réalisée par le Ministère de l'Emploi montrent que les hausses du SM réduisent les inégalités salariales. L'analyse montre qu'il y a une corrélation négative entre le ratio du SM par rapport au salaire moyen et au coefficient de Gini, et donc que lorsque la part du SM par rapport au salaire moyen augmente, les inégalités ont tendance à diminuer. Ceci implique que les bas salaires proches du SM augmentent plus que les salaires plus élevés.
- Du point de vue de l'interaction entre le SM et la pauvreté: Les données des enquêtes auprès des ménages sur les niveaux de vie montrent que le ratio du SM par rapport au seuil de pauvreté s'est amélioré entre 1985 et 2007 en milieu urbain et rural, mais que le ratio a augmenté plus rapidement en milieu rural qu'en milieu urbain. En 2007, le ratio du SM à la dépense de consommation moyenne en milieu urbain était de 1,7. Ce ratio était de 2,11 pour le milieu rural.

Ces résultats ont des implications de politique mitigées. Du côté positif, la politique actuelle du salaire minimum contribue à réduire les inégalités salariales et à améliorer les conditions de vie de ceux qui gagnent un salaire proche du SM. Le SM permet aux salariés de maintenir le ménage légèrement au dessus du seuil de pauvreté. Du côté négatif, en l'absence de gains de productivité similaires ou supérieurs, la position compétitive du secteur privé marocain s'est érodée avec les augmentations du SM et a donc réduit la demande pour des travailleurs non qualifiés. Ceci se traduit par une plus grande probabilité pour ceux qui gagnent le SM de perdre leur emploi, en particulier les jeunes et les plus âgés, et encourage les entreprises à maintenir leur production informelle. Ces facteurs font que la politique du SM du Maroc est une question très complexe.

Tableau 2.3: Evolution du SMIG et du SMAG (en dirhams)

Dates d'ajustement	Salaire mensuel industrie	Salaire mensuel agriculture
05/1981	490,88	317,20
05/1982	565,76	364,00
08/1983	678,08	436,80
01/1985	744,64	480,48
09/1985	817,44	538,32
01/1988	898,56	581,10
0/5/1989	988,00	639,08
05/1990	1085,76	702,78
01/1991	1248,00	808,08
05/1992	1372,80	888,68
07/1994	1510,08	977,60
07/1996	1659,84	1075,36
07/2000	1826,24	1183,00
06/2004	1917,55	1242,15
07/2004	2013,43	1304,26

Source: Ministère de l'Emploi

Les écarts et disparités des salaires
Les salaires du secteur privé sont demeurés essentiellement stagnants et les gains de productivité ont diminués. Les salaires réels n'ont augmenté que marginalement au Maroc. Les salaires réels moyens du secteur manufacturier ont suivi cette tendance. Globalement ils ont enregistré de modestes gains—un peu plus de 1% au cours de 1995–2007. La productivité, mesurée en tant que valeur ajoutée par travailleur, a enregistré une baisse au cours de la même période.

Les salaires du secteur public sont plus élevés que ceux du privé, ce qui traduit certaines distorsions dans les politiques salariales (et les coûts de la main d'œuvre dans le secteur privé). En moyenne, depuis les années 90, les salaires publics ont été deux fois aussi élevés que ceux du secteur privé, trois fois le salaire minimum brut et six fois le produit intérieur brut (PIB) par habitant. Le pouvoir d'achat des salaires publics a augmenté en moyenne de 1,5% par an alors que le PIB réel par habitant n'a augmenté que de 0,4% par an.

Plusieurs concessions salariales ont eu lieu au cours de la dernière décennie dans le secteur public en conséquence de la mise en œuvre de l'accord du dialogue social arrêté entre le Gouvernement et les partenaires sociaux (syndicats et associations d'employeurs). La disparité salariale importante entre les secteurs public et privé s'intensifie avec la situation plus stable et protégée des emplois publics, ce qui explique le phénomène des longes attentes pour un emploi public par les diplômés universitaires qui entrent sur le marché du travail. Enfin, on constate aussi de fortes disparités au sein des salaires publics. Les taux salariaux des entreprises publiques représentent 1,6 fois ceux de l'administration publique, et sont en hausse régulière depuis 1990 à des taux annuels supérieurs.

La politique salariale comporte toujours une discrimination à l'encontre des femmes. Les données sur les salaires moyens par genre ne semblent pas corroborer l'idée que les femmes ont les mêmes opportunités que les hommes pour accéder à des positions de responsabilité, largement rémunérées. En effet, si l'on prend seulement en considération les échelons supérieurs de la fonction publique (échelle 10 et supérieure), les salaires moyens des femmes ont diminué entre 1994 et 1998 et se sont stabilisés jusqu'en 2002. La part du salaire féminin moyen représentait 94% par rapport à celui de l'administration du GC et elle est passée à 88% en 1998 et 2002. Ces données indiquent donc que les femmes ont eu moins d'opportunités que les hommes d'accéder à des positions de responsabilité.

De même, au cours de la dernière décennie, mesurée en termes des coefficients de Gini, l'inégalité salariale s'est détériorée, passant de 0,291 en 1994 à 0,392 en 2006, soit une détérioration d'environ 2% par an.

Ventilés par niveau d'éducation, les salaires dans les entreprises publiques sont les plus élevés, suivis par l'administration publique et le secteur privé. Les salaires du secteur privé sont comparables à ceux de l'administration publique seulement pour les travailleurs ayant un diplôme universitaire, mais ils sont toujours plus bas que ceux versés dans les entreprises publiques. Un problème critique est que la demande des entreprises pour les diplômés universitaires est faible, comme le montre la structure de l'emploi dans le secteur privé par niveau d'éducation, et ceci semble lié à des questions d'imposition.

Le salaire minimum affecte certainement les salaires des travailleurs peu qualifiés et de ce fait la question se pose de savoir s'il contribue ou non à des taux de chômage plus élevés pour ce groupe. En fait, même si les taux de chômage sont plus élevés pour les travailleurs qualifiés, ils demeurent importants parmi les travailleurs peu qualifiés dans les zones urbaines (près de 10%). Comme discuté dans la section précédente, les travailleurs non qualifiés qui ne trouvent pas d'emploi dans le secteur privé formel tendent à combler les rangs des travailleurs du secteur informel qui fonctionnent avec de bas salaires et qui n'ont pas accès aux systèmes de protection du revenu.

Le partage de la valeur ajoutée

Etant donné la multiplicité et le caractère parcellaire des sources d'informations sur les indicateurs des salaires, de l'emploi et de la productivité, les seules données se prévalant de la cohérence d'ensemble se rapportant à ces indicateurs sont celles provenant de la comptabilité nationale[29].

La référence aux nouvelles données de la comptabilité nationale permet donc d'analyser de façon assez précise les tendances des principaux indicateurs de coûts salariaux et de partage des gains de productivité. Le premier de ces indicateurs est celui relatif aux salaires au niveau global et sectoriel. La rémunération totale des salariés incluant les salaires bruts, les cotisations sociales effectives et imputées aura atteint en 2006 un montant global de 187,2 Milliards de DH, représentant 36,0 % de la valeur ajoutée totale de l'ensemble du système productif. La comparaison de ce montant des salaires à son niveau en 2000 fait apparaître une hausse moyenne de 5,4% par an sur l'ensemble de la période 1998-2006.

29 Les nouveaux comptes nationaux qui se réfèrent à l'année de base 1998 fournissent en effet dans le cadre du tableau des ressources et des emplois établis annuellement au niveau de chaque branche d'activité la production, la valeur ajoutée, les salaires, l'excédent brut d'exploitation et les effectifs employés.

Tableau 2.4: Evolution de la Répartition de la valeur ajoutée

Répartition	1998	2000	2002	2004	2006	2007
Valeur ajoutée	340780	349575	395811	454278	517948	545699
Rémunération des salariés	116083	127673	146509	165239	187200	
Excédent brut d'exploitation et revenus mixtes	220402	218169	245210	285050	326184	

Source: Comptabilité Nationale. HCP

On soulignera que comparativement à cette hausse moyenne de la masse salariale nominale, la richesse créée telle qu'exprimée par la valeur ajoutée globale aura progressé à un rythme sensiblement plus soutenu, soit ou 6,1 % par an. Cet écart entre l'évolution nominale de la valeur ajoutée et la masse salariale qui peut être révélateur d'une modification de la répartition entre les revenus salariaux et les revenus non-salariaux apparaît cependant différenciée selon les branches d'activité.

La dynamique comparée de la valeur ajoutée et de la masse salariale au plan global peut être fortement influencée par le niveau de l'emploi. Les conséquences d'une telle dynamique sur la répartition des résultats générés par les activités productives ne peuvent être appréciées de façon précise que par comparaison de la tendance de la valeur ajoutée par emploi, en tant qu'indicateur de la productivité apparente du travail, au taux de salaire moyen calculé comme rapport de la masse salariale total à l'effectif des salariés.

Les résultats qui ressortent des données fournies par les comptes nationaux situent la valeur ajoutée globale par emploi à 47 252 DH en 2006 contre 36 277 DH en 2000. L'accroissement annuel de la valeur ajoutée par emploi sur l'ensemble de la période 2000-2006 aura été de 3,7 % par an. Parallèlement, le salaire moyen annuel estimé en 2006 à 43 852 DH contre 37 219 DH en 2000 aura enregistré une hausse à un taux de 3,1 % en rythme annuel. Il ressort de ces indicateurs que la dynamique des salaires a été dans l'ensemble sensiblement en retrait par rapport à celle de la valeur ajoutée par travailleur. On peut en déduire que les gains nominaux en termes de productivité apparente du travail ne se sont répercutés que très partiellement sur les revenus salariaux.

L'autre indicateur important dans la dynamique de la distribution de la richesse produit est celui de l'évolution des mesures de l'exclusion sociale, de la pauvreté et de l'inégalité. Entre 1985 et 2004, la croissance économique a été peu pro pauvre mais sensiblement défavorable aux populations vulnérables et moyennes. Ce schéma de croissance économique a été observé, à la fois, en milieu urbain et en milieu rural. Il exprime (i) un tassement des niveaux de vie au dessus du seuil de pauvreté, et (ii) une redistribution des revenus des juste moyens aux pauvres, et non des riches aux pauvres, ce qui a conservé les inégalités sociales en termes relatifs.

En fait, si la vulnérabilité a enregistré, pour la première fois, une baisse sensible entre 2001 et 2004, les inégalités sociales et spatiales sont rigides à la baisse depuis au moins une vingtaine d'années. Mesurée par l'indice de Gini, l'inégalité relative des dépenses de consommation n'a statistiquement pas changé entre 1985 et 2001, ce qui pose, encore une fois, la question du redressement du schéma de croissance économique en faveur de ses perdants, les pauvres et le vulnérables en particulier.

L'insertion professionnelle des populations pauvres ayant investi dans leur cursus devrait constituer l'ascenseur social le plus sûr. Le taux de chômage des actifs diplômés des études supérieures, issus de couches pauvres, s'est cependant situé entre 50% et 100% durant la période 1985-2001. Il a été au moins deux fois supérieur que celui des diplômés relevant des populations non pauvres. Par ailleurs, en l'absence des allocations de chômage, la pauvreté fragilise la solidarité familiale et les jeunes chômeurs en situation de pauvreté à la précarité sociale. Cette dernière résulte de la modestie du capital social des individus pauvres. Elle est l'expression manifeste de la régression du rôle que devrait jouer l'éducation – formation dans la lutte contre la pauvreté.

Tableau 2.5: Evolution des mesures de l'exclusion sociale, de la pauvreté et de l'inégalité

Indicateurs	1985	1991	1994	1999	2001	2004
Taux de vulnérabilité	24,1	22,0	22,8	23,8	22,7	17,3
Taux de chômage des pauvres	51,0	100	_	52,0	73,6	_
Taux de pauvreté	21,1	13,1	16,5	16,3	15,3	14,2
Part des 10% supérieur	31,8	30,8	-	31,0	32,1	-
Part des 10%inférieur	2,6	2,8	-	2,6	2,6	-
Part des pauvres	7,0	3,9	-	5,0	4,6	-
Indice de Gini	0,397	0,392	-	0,395	0,406	-

Source: HCP

Les écarts entre le niveau de PIB par tête du Maroc et celui des pays de la rive Nord ne se réduit pas. En 2007, le PIB per capita du Maroc calculé en PPA est 6 fois inférieur (environ 5000 dollars) à celui de la zone de l'Union européenne. Cet écart était de 5,2 en 1995. Bien qu'insuffisant pour mesurer le niveau de développement des pays, le PIB par habitant reste un indicateur incontournable pour comparer les situations économiques en terme de revenu.

Le taux de croissance du PIB au Maroc est supérieur à ceux enregistrés dans les pays de l'Union européenne. Toutefois, celui-ci est considéré comme faible lorsqu'il est rapporté à la population, étant donné que les niveaux de croissance démographique restent élevés au Maroc. Les nouveaux pays européens ont connu depuis 1990 une forte croissance du PIB par habitant et ont par conséquent limité les écarts avec les pays Méditerranéens de l'UE.

Tableau 2.6 : Comparaison de l'évolution du PIB per capita (en PPA et en dollar US)

PIB par tête en PPA	Zone Union Européenne	Zone Meda	Maroc
1995	15540	3637	2960
2000	19960	4314	3480
2005	23626	4725	3940
2006	24312	4812	4221
2007	24988	-	4362

3. Performances du marché du travail. Problèmes et défis

La situation du marché du travail a évolué en dents de scie au cours de la dernière décennie. Gonflé dans une large mesure par les flux migratoires en provenance du milieu rural, la force de travail urbaine s'est accrue à un rythme rapide alors que son profil de qualification est demeuré faible empêchant ainsi la recherche de gains de productivité à long terme. Selon les données officielles, le taux de chômage est moins élevé que par le passé mais la mesure du phénomène pose quelques problèmes. Alors que la grande majorité de chômeurs sont des jeunes sans expérience de travail, le chômage s'étend parmi les chefs de ménages et s'accroît auprès des diplômés du système éducatif.

3.1 Situation et évolution du chômage

La persistance d'un taux de chômage élevé en milieu urbain ressort de l'augmentation de la rigidité de la composante structurelle du chômage liée à la forte incidence du chômage de longue durée, affectant les trois quarts des chômeurs, plus particulièrement les diplômés[30].

En 2007, 1092 mille chômeurs ont été dénombrés parmi la population active âgée de 15 ans et plus, soit un taux de chômage de 9,8%. Par milieu de résidence, ce taux est de 15,4 % en milieu urbain contre 3,8 % en milieu rural.

Les traits saillants qui caractérisent la population active en chômage peuvent être synthétisés par les principaux indicateurs suivants:

- 72,7% de la population active en chômage sont des hommes; le chômage est essentiellement un phénomène urbain. Ainsi, un peu plus de huit chômeurs sur dix résident en milieu urbain, soit 81,1% (77,7% pour les hommes contre près de 90,1% pour les femmes);

30 Le chômage structurel trouve ses origines dans les évolutions économiques et sociales qui relèvent du long terme, en l'occurrence la composante démographique et les comportements d'activité de l'offre de travail, les désajustements entre les systèmes d'éducation et de formation et l'appareil de production et les règles de gestion du personnel par les entreprises. Le taux de chômage conjoncturel, qui est lié à la politique de la régulation de la demande, monte plus rapidement en période de mauvaise conjoncture mais recule moins vite quand l'emploi reprend en raison de l'existence de l'effet de cycle de productivité. Toutefois, le chômage conjoncturel résultant d'un ralentissement de la croissance sur une période plus ou moins longue, peut se transformer en chômage structurel.

- la population active en chômage se caractérise par sa jeunesse: 39,2% des chômeurs ont moins de 25 ans;
- ce phénomène touche relativement plus les femmes urbaines. En effet, le taux de chômage des femmes actives citadines a atteint 20,9% contre 13,9% pour les hommes citadins;
- prés de la moitié des chômeurs (49,1%) sont des personnes qui n'ont jamais travaillé (51,3% pour les citadins et 39,5% pour les ruraux);
- 65,8% des chômeurs sont en situation de chômage depuis plus d'un an (cette proportion est de 70,4% dans les villes et de 46,0% dans les campagnes).

Selon le diplôme obtenu, 67,4% des actifs en situation de chômage sont titulaires d'un diplôme. Par sexe, si la part des diplômés de niveau moyen est importante parmi les chômeurs de sexe masculin (45,9% contre 35,8% pour les femmes), ce sont les diplômés de niveau supérieur qui dominent chez les femmes chômeurs. En effet, près d'une femme active en chômage sur deux est diplômée de niveau supérieur (soit 47,7%, cette proportion n'est que de 17,7% pour les hommes). La part relative des chômeurs diplômés de niveau supérieur s'est établie à 27,4% en milieu urbain et à 10,6% en zones rurales, soit 24,3% au niveau national.

Il ressort des données ci-dessus que le chômage des diplômés de niveau supérieur continue de marquer le marché de travail national. Leur nombre est estimé en 2007, à 265 mille, 46,9% de cette catégorie de chômeurs sont des femmes, et presque les trois quarts de ces chômeurs sont en quête de leur premier emploi. Il est à noter, par ailleurs, que 79,2 % des diplômés de niveau supérieur sont en chômage depuis plus d'un an.

L'analyse des taux de chômage révèle que le chômage au Maroc est essentiellement dû aux difficultés de première insertion. Il frappe de plein fouet les diplômés de niveau supérieur, principalement les femmes. En effet, ce sont les jeunes, âgés de 15 à 24 ans, qui sont relativement les plus exposés au chômage. Ainsi, selon le sexe et au niveau de cette tranche d'âges, les taux masculins atteignent 30,1% dans les villes et 8,7% dans les campagnes, et les taux féminins sont de 35,9% dans les villes et de 3,0% dans les campagnes.

Par ailleurs si le taux de chômage baisse avec l'âge, force est de souligner qu'il augmente avec le niveau de diplôme. Le taux de chômage passe de 57,9% pour les jeunes diplômés de niveau supérieur âgés de 15 à 24 ans à 8,7% pour les non diplômés de la même tranche d'âge. Il ressort des données, que globalement le taux de chômage s'accroît sensiblement avec le niveau du diplôme. Pour les femmes, le taux de chômage le plus élevé au niveau national est enregistré au niveau de la catégorie des diplômées de niveau supérieur (soit 28,5%). Pour les hommes le taux de chômage le plus élevé, au niveau national, est relevé chez les diplômés de niveau moyen (soit 16,9%).

Ces données illustrent aussi les écarts existants, par milieu de résidence et âge, entre les taux de chômage des femmes et ceux des hommes selon le niveau du diplôme. En effet, elles révèlent que les femmes diplômées actives sont plus touchées par le phénomène du chômage que leurs homologues de sexe masculin et que cet écart augmente avec le niveau du diplôme. Ainsi, cet écart (taux de chômage féminin – taux de chômage masculin) passe de –2,5 points pour les "sans diplôme", à 6,6 points pour les diplômés de niveau moyen, pour atteindre 11,8 points pour les diplômés de niveau supérieur. Le même constat établi plus haut, concernant les écarts entre les taux de chômage féminins et masculins reste valable par niveau scolaire.

Tableau 3.1: Tableau. Chômage effectif

		1995			2000			2007		
		M	F	T	M	F	T	M	F	T
Par âge		916108	579806	**1495914**	1035545	358712	**1394257**	794490	297634	**1092124**
	15-24	435465	233391	**668856**	428254	125701	**553955**	321673	106909	**428582**
	25-34	404796	306002	**710798**	430157	184801	**614958**	320570	137604	**458174**
	35-44				125402	39814	**165216**	101121	43091	**144212**
	45-59	52672	31741	**84413**	47781	7802	**55583**	48157	9306	**57463**
	60 et +	23175	8672	**31847**	3951	594	**4545**	2969	724	**3693**
Par niveau										
	Sans	446171	258156	**704327**			**497618**	82150	27716	**109866**
	Primaire	311157	169680	**480837**			**598102**	449214	98644	**547858**
	Second	113558	106324	**219881**			**155474**	155461	69752	**225213**
	Université	45222	45646	**90869**			**142027**	107270	99322	**206592**
		916108	579806	**1495914**			**1394257**	395	2200	**2595**

Au niveau macro, la faible croissance qui a affaibli la demande de main-d'oeuvre est à l'origine du rythme lent de la création d'emplois. Le principal indicateur des tendances de la demande de main-d'oeuvre est la croissance de la production. La faible croissance des années 90, jointe à une modeste croissance de près de 4% dans les années 2000, explique les tendances antérieures de la croissance de l'emploi (et du chômage). Depuis 2000, la production à la hausse a été à l'origine de taux de chômage agrégés à la baisse.

Le chômage a progressivement diminué et demeure essentiellement un phénomène urbain. En conséquence, au cours de la dernière décennie, le nombre absolu de chômeurs urbains est demeuré constant à 1 million de personnes et le nombre absolu de chômeurs ruraux a diminué de plus de moitié à 172.000 personnes.

Au niveau micro, la faible demande de main-d'oeuvre est la conséquence d'une inadéquation des qualifications car le chômage affecte principalement les travailleurs éduqués, en particulier les primo-demandeurs d'emploi et les diplômés des universités.

Dans le même ordre d'idées, les données de la Population active de l'enquête du Ministère de l'Emploi montre qu'en 2007 le problème du chômage affectait principalement les cohortes d'âge des 15 à 24 ans et des 25 à 34 ans, groupant les primo-demandeurs d'emploi. Compte tenu du grand nombre de diplômés de l'enseignement supérieur et de travailleurs jeunes parmi les chômeurs, les données suggèrent un haut niveau de salaire de réservation et une forte préférence des diplômés pour un emploi dans le secteur public, ainsi qu'une capacité implicite de leurs familles à leur venir en aide pendant de longues périodes de chômage.

La crise et ses effets sur l'emploi

La crise mondiale actuelle est saisissante par son ampleur, par la rapidité de sa contagion à la sphère réelle, mais aussi par sa durée, puisqu'elle continue de produire ses effets.

Le Maroc se trouve confrontée à une crise majeure, qui se diffuse lentement dans la sphère de l'économie réelle. Les risques de crise font maintenant partie intégrante de l'environnement économique.

Bien que la crise intervient dans un environnement macro-économique assainie et que les perspectives de bonnes récoltes atténuent les pertes probables de point de croissance, le Maroc commence déjà à subir de lourdes conséquences, dues en partie à l'exposition de quelques secteurs de son économie aux chocs extérieurs. La demande adressée au Maroc, les transferts des MRE, les flux de tourisme subissent les contrecoups des pertes de pouvoir d'achat des ménages des pays européens ou des réallocations plus prudentes de leurs dépenses de consommation.

Cette tendance, si elle perdure, pourrait avoir des conséquences durables et néfastes sur la croissance, la capacité de supporter des conditions de compétitivité plus exacerbées dans le marché mondial et sur le niveau de vie des membres les plus défavorisés de la société, En effet, il est indiscutable qu'en raison de la globalisation des marchés et de l'interdépendance des économies nationales, la crise peut se répandre de plus en plus rapidement et à une échelle de plus en plus large.

L'impact social va se faire sentir à travers plusieurs canaux de transmission à caractère macroéconomique. Si les prévisions de croissance économique pour l'année 2009 varient selon les sources d'information, le taux de croissance des activités non agricoles va, lui, enregistrer assurément un net ralentissement (3.9% en 2009 contre 5% en 2008 selon le HCP) suite à la récession mondiale (la demande mondiale adressée au Maroc devrait baisser de 1.2% en 2009 après avoir crû de 2% en 2008). Les exportations ont baissé de 31.8% en janvier- février 2009, en comparaison avec la même période de l'année dernière, alors que le coût des importations n'a reculé que de 15.7% suite à la baisse des prix des matières premières durant les derniers mois. Les recettes touristiques et les investissements étrangers ont reculé respectivement de 25.5% et de 71.9% entre début (janvier février) 2008 et début 2009.

L'impact de ce choc macro-économique sur l'emploi se fait déjà sentir: à titre d'exemple, on assiste depuis quelques mois dans l'industrie textile et habillement à des licenciements de milliers d'ouvriers - notamment des femmes- ainsi qu'à d'importantes réductions du temps de travail. Ainsi 31680 salariés ont disparu des registres de la CNSS en février 2009 comparativement à la même période que l'année dernière. C'est dans le textile et l'automobile que les dégâts ont été les plus importants avec la perte respectivement de 11 653 et 2586 emplois. Et c'est aussi durant cette période que des baisses ont été enregistrées dans l'hôtellerie, le BTP et le tourisme. De même, plusieurs entreprises commencent à revoir à la baisse leur politique salariale, la promotion de leur personnel et les primes d'encadrement, tout en réduisant les budgets de formation; d'autres abandonnent les projets de recrutement et/ou privilégient les contrats d'emplois à durée déterminée.

Une autre courroie de transmission importante de la crise au niveau des ménages pauvres est constituée par les transferts des marocains résidents à l'étranger (MRE) qui représentaient plus de 8% du Produit Intérieur Brut marocain en 2008. Or, les envois des MRE ont chuté de près de 15%, passant de 8.2 milliards de dirhams en janvier-février 2008, à un peu plus de 7 milliards pour la même période de l'année 2009. On devrait donc s'attendre à une baisse importante des sources de revenus et du pouvoir d'achat des familles des émigrés marocains dont les familles vivant au Maroc appartiennent, pour la plupart, à des couches modestes ou pauvres.

Pour faire face à la crise, le gouvernement marocain a pris des mesures pour aider certains secteurs considérés comme particulièrement exposés, à savoir le textile-habilement, le cuir et les équipements automobiles.

Ce plan « anti-crise » se compose de trois volets:

- un volet social (prise en charge par l'Etat de 100% des cotisations patronales à la Caisse Nationale de Sécurité Sociale en contrepartie de l'engagement des entreprises exportatrices bénéficiaires de s'engager sur l'honneur de maintenir leurs effectifs);

- un volet financier (mise en place d'un mécanisme de garantie, par la Caisse Centrale de Garantie au profit des entreprises exportatrices, de l'accès au crédit d'exploitation et de report des échéances 2009 pour les crédits d'investissement)

- et un volet commercial (prise en charge par l'Etat de 80% des frais de missions commerciales ou de diversification des marchés).

Sur le plan social et pour limiter l'impact négatif de la hausse mondiale des prix des produits de base sur la population, le gouvernement a pris les mesures suivantes: l'augmentation de la dotation de la Caisse de Compensation destinée aux produits subventionnés, la suspension provisoire des taxes sur les importations de blé, et une légère augmentation du SMIG.

Les premiers résultats du plan « anti- crise » montrent que les mesures n'ont pas évité aux travailleurs des baisses de salaires ou des réductions du temps de travail. Les licenciements et les restrictions des conditions de travail touchent par ailleurs plusieurs secteurs qui ne sont guère couverts par ledit plan (tourisme, agriculture tournée vers l'exportation, construction, etc.). Les mesures prétendument à caractère social n'ont guère empêché la flambée des prix des produits de première nécessité dont la plupart sont libéralisés alors que l'augmentation du SMIG n'a guère compensé la hausse du coût de la vie, d'où une nette perte de pouvoir d'achat pour des milliers de travailleurs.

Evaluation du chômage: une mesure perfectible

La source statistique de mesure du chômage au Maroc est constituée par le dispositif d'enquêtes par sondage auprès des ménages mis en place par la Direction de la Statistique. Cet instrument a connu quelques changements méthodologiques après le recensement de 1994, la collecte est étalée sur toute l'année pour tenir compte des fluctuations saisonnières, la technique d'interview utilisée semble assez poussée pour détecter les personnes qui ne cherchent du travail que d'une façon occasionnelle (chômeurs marginaux), l'emploi du temps de la femme serait mieux décrit pour appréhender l'activité professionnelle et éviter de la confondre avec les tâches domestiques, des cas de personnes découragées par la recherche active sont saisis par des questions spécifiques sur les raisons de la «non recherche» d'emploi, etc.

Même si personne ne doute du professionnalisme de la Direction de la Statistique et des responsables en charge de ce dossier, il n'empêche que le sentiment qui prévaut actuellement est que la mesure du taux de chômage serait en deçà de la réalité telle serait perçue par la majorité des observateurs. Soutenir que le taux de chômage est de 4%-6% en milieu rural et que le taux au plan national est de 12-14% suscite beaucoup de réserves. Le problème réside dans la « capacité » du concept à tenir compte de certaines spécificités locales.

i) Disponibilité à travailler et recherche d'emploi

Le chômage est un concept fondamentalement basé sur la notion de recherche d'emploi sans laquelle l'individu n'exerçant pas une activité rémunératrice est classé comme inactif. Les chômeurs se définissent donc comme des individus n'ayant pas d'emploi et qui manifestent activement leur disponibilité à offrir leur capacité de travail sur le marché. De ce fait, il est possible de ne pas faire cas des personnes n'acceptant de travailler que sous certaines conditions relatives notamment au type d'emploi, au niveau du salaire, au nombre d'heures…, pendant une période déterminée de l'année qui peut se trouver en dehors de l'intervalle temps retenu comme période de référence de l'enquête. Le second critère associé au premier a pour but de s'assurer que, pour mériter le qualificatif d'actif, la personne doit non seulement être disponible avec une volonté de travailler mais doit prouver qu'elle s'est consacrée à une recherche active d'un emploi durant la période de référence. Dans ce cas, on note une sous-estimation du nombre total de chômeur car il n'existe pas de filières de recherche d'emploi structurées et opérationnelles qui peuvent être mises efficacement à contribution

ii) La notion d'activité

Le classement des personnes en âge de travailler comme actives ou inactives cherche en fait à mesurer les ressources en main d'œuvre dont dispose l'économie nationale. Pour que cette notion d'activité permette également aux personnes de se situer clairement par rapport au travail, il faudrait que soit établie une frontière entre les activités domestique et marchande. L'exploitation agricole familiale comme d'ailleurs l'artisanat et le petit commerce restent des lieux d'exercice d'une activité à la frontière des sphères domestique et marchande: c'est là que l'on trouve la catégorie difficile à cerner d'aide - familial. Les données sur le taux de chômage en milieu rural sont sujettes à interprétation. Il est difficile d'admettre un taux autour de 5% avec une population d'aides familiaux qui dépasse les 3,5 millions et une part de l'emploi non rémunéré de près de 50%

iii) Les travailleurs découragés

Le sous-emploi se manifeste sous différentes formes. En effet, certains individus sortent de la population active faute de perspectives d'emplois tandis que d'autres décident de ne pas y entrer. On les désigne communément sous le nom de "travailleurs découragés" et on les considère généralement comme des chômeurs "latents" ou "non déclarés". Ils sont exclus de la population active parce qu'ils ne répondent pas aux critères de recherche d'emploi approprié. Cela peut tenir à plusieurs causes notamment à la conviction qu'il n'y a pas d'emplois disponibles dans la région ou que l'intéressé ne possède pas les qualifications nécessaires pour les emplois disponibles. Un progrès de la connaissance sur ce phénomène complexe s'impose. Il s'agit de garantir la pertinence et la stabilité des concepts, tout en améliorant la qualité de l'information. Les normes statistiques internationales fournissent une référence solide et communément acceptée pour la définition des trois concepts fondamentaux de l'inactivité, de l'emploi et du chômage. Il ne s'agit pas d'en modifier la logique, mais plutôt d'aider à ce qu'elles soient rendues plus précises, car dans la pratique, leur interprétation est parfois ambiguë.

Le sous emploi: une autre dimension du déséquilibre du marché du travail

En dépit, des améliorations sensibles ces dernières années attestées par l'orientation à la baisse du taux de chômage, la situation du marché du travail continue de présenter un certain déphasage par rapport aux performances économiques réelles. La dynamique du marché du travail avec ses implications quant aux politiques de promotion de l'emploi et de résorption du chômage ne peuvent être mieux appréhendée sans une analyse approfondie des données décrivant les variables pertinentes relatives à la population active, à ses principales caractéristiques et à leur évolution en relation avec l'activité économique.

L'année 2007 présente le cas de figure qui offre l'illustration la plus significative du décalage plus ou moins marqué que l'on peut observer entre l'évolution de l'activité économique et les performances en matière d'emploi. On rappellera en effet que l'année 2007 s'est achevée au plan de l'activité économique sur un net repli du rythme de croissance avec une progression du PIB réel limitée à 2,7 %, soit près de 5 points en moins par rapport à l'exercice précédent. Mais en dépit de cette contre-performance qui marque une contraction importante de l'activité, des revenus et de la demande, le taux de chômage a pu se maintenir pratiquement au même niveau que celui de l'année 2006, soit 9,8 % en moyenne nationale. Parallèlement, la population en chômage s'est accrue de quelque 30 milliers de personnes en passant de 1 062 milliers de chômeurs recensés en 2006 à 1092 milliers en 2006.

Le décalage apparent entre les performances de l'activité économique et l'évolution du marché du travail tel qu'il ressort des statistiques relatives à l'activité et à l'emploi peut s'expliquer essentiellement par la structure même de l'appareil productif et les différences importantes qui caractérisent l'activité et l'emploi entre milieu rural et milieu urbain. Les statistiques de l'emploi situent en effet le taux de chômage en milieu rural à un niveau variant selon la conjoncture agricole entre 4 et 5%, un niveau considéré généralement par la plupart des analystes comme anormalement trop bas. Le fait que le taux de chômage en milieu rural tel que donné par les statistiques de l'emploi se situe à un niveau très faible et varie peu en fonction des fluctuations économiques influence évidemment la moyenne nationale en réduisant le taux global. Ceci contribue par ailleurs à faire apparaître quelque déphasage par rapport aux tendances de l'activité et aux cycles de production.

Le deuxième élément important concerne l'appréciation même de la situation du marché du travail à travers les indicateurs portant sur l'emploi et le chômage fournis par l'enquête sur la population active. L'une des données remarquables de cette enquête et qui mérite toute l'attention est celle relative à la population active sous employée. Les données relatives à l'année 2007 situent cette population à 995 milliers de personnes contre 1,2 millions en 2007.

Comme la notion de sous-emploi utilisée dans l'élaboration des données est assez large et peut revêtir des réalités nettement différenciées selon les situations, les secteurs d'activité et le milieu, on peut aisément concevoir qu'une partie non négligeable du sous-emploi répond d'une certaine manière à la définition du chômage. Ceci est particulièrement le cas pour le milieu rural qui compte à lui seul plus de la moitié de la population sous-employée. Au plan sectoriel, les activités agricoles en milieu rural semblent les plus affectées par le phénomène du sous-emploi étant donné la nature des emplois dans l'agriculture et leur caractère saisonnier. En ce qui concerne les professions, le sous-emploi est plus fréquemment observé au niveau des ouvriers et manœuvres agricoles et non-agricoles ainsi qu'au niveau des petits métiers.

L'appréciation des déséquilibres du marché du travail ne peut donc ignorer cette dimension importante que représente le sous-emploi. La référence au seul taux de chômage peut dans ces conditions donner une image incomplète de la situation réelle du marché.

3.2 L'économie informelle

Devant l'état actuel du marché du travail, le secteur informel apparaît comme un remède à un dysfonctionnement qui est alors quelques peu contenu, réduisant de façon relative la détérioration du niveau de vie d'une grande partie de la population. Il agit ainsi comme un filet de sécurité par son action sur la réduction du chômage et « l'enfantement » d'activités génératrices de revenus. La comptabilité nationale évalue la part du secteur informel non agricole dans le PIB à 17%.

Le concept de l'informel est employé avec une grande facilité dans les appréciations courantes portées sur les structures de l'économie nationale. Chacun y va de sa définition et de sa perception. Une approche plus objective utilise trois critères: taille, informalité juridique, faible intensité capitalistique. Mais la liste des critères varie d'une approche à l'autre. D'où la diversité des estimations sur sa dimension, sa composition et sa contribution à la création des richesses. Nombreux sont ceux qui considèrent que l'absence de reconnaissance juridique ou de conformité au cadre réglementaire suffit pour désigner ces activités et les revenus qu'elles génèrent. Les quelques enquêtes très riches entreprises sur l'insertion institutionnelle des micro-entreprises permettent de mieux cerner la structure de cette composante des activités nationales et de porter une appréciation plus fondée sur la pertinence de l'informalité juridique.

Le Maroc, comme la plupart des pays MENA, a un secteur informel d'une taille moyenne parmi les régions en développement**.** Le secteur informel représente environ 45% de l'emploi hors agriculture, mais lorsqu'on le compare à d'autres régions, ces estimations devraient être considérées élevées vu la part relativement plus importante de l'emploi public dans la région.

En termes de PIB, le secteur informel représente environ 36%. Tenant compte de sa taille relative, et en comparaison de son taux de croissance anticipé du PIB par habitant, tel que défini par la courbe de régression, le Maroc a un taux de croissance inférieur à ce qui pourrait être anticipé, autrement dit le pays se développe à un rythme plus lent qu'il le devrait. Le Maroc est parmi les pays MENA qui ont une faible couverture de sécurité sociale. En 2005 à peine 25% de la population active marocaine étaient protégés par la sécurité sociale[31].

31 La couverture de sécurité sociale a été utilisée comme mesure alternative de l'informalité. Elle a l'avantage que la définition du secteur informel n'est pas contrainte par la taille d'une entreprise. La couverture de sécurité sociale en tant que mesure de l'emploi formel change également la définition de l'informalité des caractéristiques de l'entreprise à la nature du

La production de ce secteur est le fait de plus de 1,2 millions d'unités, localisées dans leur grande majorité dans le milieu urbain (71,6%) et constituées pour plus de la moitié, d'unités commerciales (52,8%). Le secteur informel se révèle être par ailleurs, un important pourvoyeur d'emplois avec une offre où on dénombre plus de 1,9 millions d'actifs occupés, au cours de la période 99/2000, correspondant à 39% de l'emploi non agricole total, soit 20,3% de l'emploi total.

Sous l'effet conjugué d'une croissance démographique importante et d'un exode rural massif, des petits métiers ont connu une expansion soutenue. Avec la crise économique et financière des années 80, ces activités sont devenues un réceptacle pour les jeunes ruraux et urbains que le secteur moderne n'arrive pas à absorber. Ces activités de petite dimension prolifèrent sous des appellations diverses: secteur traditionnel, non structuré, non organisé, informel, etc. La permanence de la récession a modifié la perception que l'on a de ce secteur et du rôle qu'il peut jouer comme "amortisseur" de la crise économique et sociale. Les enquêtes de terrain ont permis une meilleure identification de ses composantes et une plus sérieuse évaluation de son potentiel et de ses contraintes.

Tableau. Principaux indicateurs des caractéristiques du secteur informel

Indicateurs	**Milieu de résidence**		
	Urbain	**Rural**	**Ensemble**
% des ménages ayant au moins une unité informelle	21,8	12,7	**18,2**
% de la population dépendante des gains d'une unité informelle	25,6	14,5	**20,5**
Répartition en % des unités informelles	71,6	28,4	**100,0**
Répartition des chefs d'unités informelles selon le sexe			
Masculin	87,1	88,8	**87,6**
Féminin	12,9	11,2	**12,4**
Ensemble	100,0	100,0	**100,0**
% des chefs d'unités informelles qui n'ont aucun niveau scolaire			
Hommes	36,8	51,4	**41,0**
Femmes	48,9	80,5	**57,0**
Ensemble	38,9	54,6	**43,0**

Source: D'après les données de la Direction de la Statistique

Certes le secteur informel représente au Maroc une réalité complexe, il n'en reste pas moins que le phénomène du travail informel est aussi révélateur de déséquilibres et autres dysfonctionnements entre l'offre et la demande de main d'œuvre.

L'ENSI révèle que le secteur informel englobe plus de 40% de l'ensemble de l'emploi non agricole, ce qui correspond à 20,3% de l'emploi total. Les actifs occupés du secteur informel non agricole sont essentiellement localisés en milieu urbain (72,7% contre 27,3% pour le rural), alors que l'activité informelle dans l'emploi non agricole est à prépondérance rurale (54,9% contre 35,1% pour l'urbain).

Les formes d'emploi font une large place à l'auto emploi (69%) et aux unités de production n'employant qu'une seule personne (70,5%). Le salariat y reste très peu répandu et ne dépasse guère 14,2% de l'ensemble de l'emploi informel non agricole. Le lien de parenté y joue un rôle dominant vu qu'on dénombre 81,4% des employés justifiant d'un lien de parenté avec le chef de l'unité de production informelle. Le secteur informel constitue par ailleurs une structure d'accueil privilégiée pour l'emploi engendré par l'exode rural dont la part représente 44,2% de l'emploi non agricole.

contrat d'emploi. Ceci est tout particulièrement pertinent dans la région MENA, où de nombreux travailleurs ayant un emploi dans une entreprise officiellement établie travaillent sans contrat ou sans couverture de sécurité sociale.

L'ENSI fait ressortir par ailleurs, en termes de caractéristiques économiques pour l'emploi, que le commerce et la réparation y constituent un secteur d'activité prépondérant avec 48,2% des actifs occupés informels alors que l'industrie et l'artisanat n'occupent que 25% des travailleurs informels, tout en constituant un secteur attractif pour les femmes (30,1% des travailleurs informels du secteur) et pour le salariat (21,5%).

Au total, le secteur informel reste un cadre de prédilection de la précarité et de l'absence de protection. On y dénombre 2% seulement de travailleurs sous contrats alors que 66,1% acceptent d'être engagés sur la base d'un simple accord verbal et 31,8% opèrent sans accord et sont donc davantage exposés à l'arbitraire et à l'humeur de l'employeur.

La prolifération de l'emploi indépendant s'est accélérée depuis 1990 et l'auto-emploi reste la forme dominante de création d'emplois. Ce phénomène doit être lié, non seulement à la situation de crise de l'emploi qui sévit au niveau de l'économie, mais également à la structure d'ensemble de l'économie. L'absence de contrôle et la flexibilité qui le caractérise ont fait que le secteur informel a toujours existé, et feront qu'il existera toujours même en période de forte croissance.

Le secteur informel a ainsi envahi, aujourd'hui, toutes sortes d'activités économiques. En agriculture comme dans le petit commerce, les services personnels, l'artisanat, le transport, la construction ou le crédit usurier, le secteur informel y a réussi une infiltration où il assure une part plus ou moins grande de l'activité. Ses effets sur la production, la consommation, l'investissement, l'emploi jouent un rôle régulateur dans l'économie et c'est ce qui «légalise» ou du moins impose sa survivance.

D'ailleurs, il faut préciser que le secteur informel est relativement toléré par l'Etat dans le cadre de la lutte contre le chômage. La politique de l'Etat allait être axée sur l'aménagement de créneaux susceptibles de pallier son essoufflement et les carences du secteur privé. La promotion de l'auto -emploi, du travail indépendant et l'encouragement du microcrédit sont autant d'initiatives qui participent à l'impulsion du secteur informel. Ce dernier concentrera alors de nombreuses petites ou micro entreprises dont une partie non négligeable, est gérée par des femmes.

Le montant des revenus fait apparaître que les salaires mensuels moyens varient selon la situation dans la profession, le niveau de qualification, d'éducation, l'expérience et le type du travail. Les motifs d'insertion sont révélateurs de ces niveaux de rémunération. La multiplication des unités se fait essentiellement dans les secteurs qui n'exigent ni compétence ni capital d'installation et qui emploient relativement peu de main d'œuvre.

La précarité de la main d'œuvre et des revenus du secteur informel s'explique par l'instabilité et la fragilité de l'environnement économique dans lequel évoluent ces unités. Le type d'activité et l'absence de contrôle constituent les motifs majeurs de l'informalité juridique. Le coût élevé et la complexité des procédures ne sont pas des obstacles majeurs. 93% des micro-entreprises ne détiennent pas une comptabilité, 91% ne sont pas inscrites à une caisse de sécurité sociale et 41% ne sont pas enregistrées au registre du commerce. Placées dans un meilleur environnement et sous certaines conditions, ces unités verraient certaines de leurs difficultés s'atténuer, voire disparaître.

Les obstacles à l'intégration du secteur formel sont avant tout liés au coût élevé (79 %) et à la perspective de charges supplémentaires (59 %). La complexité des procédures intervient mais moins que les autres facteurs. En définitive, les contraintes à l'intégration au secteur formel sont d'abord de nature économique. En général, l'impression de stagnation ou de régression de leur unité l'emporte chez les micro- entrepreneurs sur le sentiment de progression de celle-ci.

Une enquête récente ECA révèle que la concurrence du secteur informel est une contrainte majeure pour plus de 34% des entreprises (formelles) de l'échantillon et occupe le quatrième rang dans le classement général des contraintes[32]. Cette enquête permet d'illustrer cette idée que l'informel est un continuum qui dépend du degré de conformité aux obligations légales et fiscales[33]. Parmi les micro-entreprises interrogées, 34% sont totalement informelles et n'ont aucune relation avec l'administration[34]. Seulement 8% ont des relations avec toutes les administrations et peuvent être considérées comme formelles. Le restant des entreprises (58%) appartient à la catégorie des semi-formelles.

Le degré de formalité d'une entreprise résulte de la conjonction de facteurs internes aux entreprises (éducation) et de facteurs externes (fiscalité). La majorité des entreprises considère que le principal obstacle à la formalisation est lié à la charge fiscale supportée par les entreprises lorsqu'elles entrent dans le secteur formel (56%). La faible productivité est la principale raison de l'emploi informel. Le problème de l'informalité ne concerne pas seulement la sécurité sociale mais d'autres réglementations qui influent sur les coûts d'entrée élevés ou la bureaucratie pour enregistrer une entreprise.

Les coûts associés à l'établissement et à l'exploitation d'une entreprise au Maroc sont peu importants. Il y a un grand nombre d'entreprises formelles dont la faible productivité et les coûts liés à la réglementation du travail les incitent à opérer en dessous du salaire minimum. Il ressort qu'un peu moins de la moitié des entreprises formelles de l'enquête ECI (390 sur 857) n'atteignent pas le niveau plancher de productivité nécessaire pour payer les salaires minima et coûts de la main-d'oeuvre au Maroc

3.3 L'impact des migrations sur le marché du travail

Le Maroc a connu depuis son indépendance en 1956 l'immigration légale d'étrangers, surtout dans le cadre des diverses programmes de coopération ou relevant d'institutions étrangères basées au Maroc. Le recensement de septembre 2004 a montré que sur une population de 29.840.273 personnes au Maroc, les étrangers installés légalement au Maroc ne représentaient que 51.435 personnes. Ce chiffre n'est pas très élevé et laisse à penser qu'une partie des étrangers vivant au Maroc se trouvent dans une situation irrégulière. La Direction de l'Emploi du Ministère marocain du travail vise en moyenne quelques six milles contrats de travail par année. Ainsi 6236 contrats ont été validés en 2004, dont 582 pour les Turques qui constituent la deuxième communauté étrangère au Maroc après les Française qui sont 2619 travailleurs, les Belges et les Espagnoles, sont dans la troisième place. Les italiens sont classés au quatrième rang.

Depuis les années 1990, le pays a commencé à connaître une immigration informelle. Cette immigration, surtout illégale, provient particulièrement de pays subsahariens. Mais il n'existe pas de statistiques fiables des migrants illégaux au Maroc. Près de 3.000 étrangers travailleraient au noir au Maroc. Au total, les inspecteurs du travail ont recensé 45 nationalités dont des Anglais, des Libanais, des Coréens et des Saoudiens. Mais les Chinois et les Français demeurent plus nombreux.

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32 Pour analyser de manière plus approfondie ce problème, une enquête spécifique a été réalisée auprès de 200 micro-entreprises dans plusieurs villes marocaines (Rabat, Casablanca,…). Les entreprises interrogées comptent moins de 5 employés et opèrent dans plusieurs secteurs d'activité. Le questionnaire de l'enquête a permis de recueillir des informations sur les caractéristiques de l'entreprise, son degré de conformité aux obligations légales et fiscales, ainsi que les obstacles à la formalisation et à la croissance

33 Une entreprise est considérée comme totalement formelle lorsqu'elle remplit la totalité de ses obligations légales et fiscales. De même, une entreprise est totalement informelle quand elle contrevient à l'ensemble de ses devoirs réglementaires. Dans la réalité, un très grand nombre d'entreprises se situent entre ces deux pôles. A l'intérieur de cette zone grise, certaines peuvent remplir 10% de leurs obligations alors que d'autres en respectent 50% ou 80%. Le secteur informel peut être représenté comme un continuum de situations qui échappe aux classifications binaires (formel/informel).

34 Dans le cas du Maroc, on distingue trois critères de formalité: l'inscription au registre de commerce, le paiement des impôts et l'affiliation à la CNSS.

Tous les secteurs d'activités sont concernés, avec une forte concentration de travailleurs étrangers dans l'hôtellerie et la restauration. Deuxième constat, non moins inquiétant, la fraude touche même les entreprises structurées.

Pourtant, le code du travail est clair. Dans son article 516, il stipule que « tout employeur désireux de recruter un salarié étranger doit obtenir une autorisation de l'autorité chargée du travail ». Le contrat de travail établi avec le salarié étranger doit être visé par le ministère de l'Emploi. Un visa qui n'est pas automatique puisque le profil engagé doit être rare et non disponible au niveau local. Une disposition mise en place depuis 2005 par arrêté ministériel pour protéger le marché de l'emploi. La preuve de la rareté du profil est, quant à elle, déléguée à l'Anapec (Agence nationale pour la promotion de l'emploi et des compétences). L'agence doit vérifier qu'effectivement il n'existe aucune demande locale pour l'emploi concerné. Sur le terrain, l'inspection du travail a découvert que des entreprises emploient des étrangers même pour des postes qui ne requièrent aucune expertise particulière. Le plus souvent aussi les employeurs justifient l'emploi d'étranger au noir par leur méconnaissance de la réglementation. Du moins si l'on se réfère aux déclarations d'un inspecteur du travail.

En réalité, ce qui rebute les employeurs c'est le risque d'une application rigide de la loi. Il est vrai que la procédure est contraignante, mais le ministère de l'Emploi tient compte des contraintes des entreprises. C'est le cas pour les franchises auxquelles le cahier des charges impose certains profils. Idem pour les entreprises étrangères qui remportent des marchés au Maroc et qui préfèrent confier des postes « sensibles » à leurs concitoyens: comptabilité ou direction financière et parfois même la gestion des ressources humaines. Aujourd'hui, ces étrangers qui travaillent au noir ont été sommés de se conformer à la réglementation.

La plupart des illégaux subsahariens viennent par l'Algérie. Ils font souvent la traversée du désert algérien dans des conditions inhumaines. Au Maroc, dans l'attente d'un passage vers l'Europe, ils vivent terrés dans les forêts du Nord, à quelques kilomètres des enclaves espagnoles de Ceuta et Melilla ou au Sud dans les régions faisant face aux Iles Canaries. Chaque jour ou presque, le détroit de Gibraltar engloutit ses morts. Ils sont près de six cents à y être disparus en 2004.

La lutte des autorités marocaines contre la migration clandestine a pris une grande ampleur. Selon le Ministre marocain de l'intérieur, « il a été procédé en 2004 au démantèlement de plus de 425 réseaux spécialisés dans l'émigration clandestine, soit une augmentation de 60% par rapport à l'année 2003 au courant de l'année 2004 ».

Ce sont en majorité des hommes jeunes (42 % ont entre 26 et 30 ans) et éduqués (38 % ont au moins le bac et 24 % ont suivi des études supérieures; seuls 10 % n'ont jamais été scolarisés). Certains (libériens, ivoiriens...) répondent aux critères de demandeurs d'asile, mais la plupart sont partis pour assurer leur survie et celle de leur famille.

3.4 Principaux défis

La précarité du travail féminin

La structure de l'emploi par sexe fait apparaître une progression appréciable du nombre d'emplois féminins au cours de la dernière décennie. Mais parmi un peu plus d'un million de femmes venues grossir la population active, occupée depuis près de dix ans, plus des quatre cinquième ont contribué au développement, de professions déjà très féminisées: ouvrières agricoles, employés de la fonction publique, professeurs et professions scientifiques, professions intermédiaires de la santé et du travail social, personnels de services directs aux particuliers. Une infime minorité de femmes seulement appartiennent à la catégorie cadres et professions intellectuelles supérieures contre 5 % d'hommes.

Ce contexte peu favorable amplifie les disparités. Les femmes sont principalement concernées par les formes d'emploi précaire. Dans l'industrie, les femmes sont souvent des travailleurs occasionnels: 15 % de la population en emploi travaille à temps partiel. Formule très inégalement partagée puisque moins de 5 % des hommes sont concernés par cette modalité d'emploi contre 30 % des femmes. De plus, la proportion d'emplois précaires dans les professions féminisées les moins qualifiées est particulièrement importante. En témoignent les taux d'emploi précaires des employés de commerce ou des personnels de services directs aux particuliers. Les écarts observés en matière de conditions d'emplois indiquent que la conjugaison de la féminisation et de la précarisation jouent au sein d'espaces professionnels déterminés.

Les enquêtes classiques sur l'emploi, au même titre que les recensements de population ne prennent pas en considération le sous emploi. Toutefois, l'enquête budget temps des femmes dont l'objectif a été focalisé sur les données susceptibles de mesurer la contribution de la femme au développement durable, autorise une analyse en terme d'heures travaillées au cours de la semaine de référence. Cette enquête, tout en permettant une réévaluation, de l'ordre de 10% en moyenne, du taux d'activité féminine comparativement aux valeurs qu'il présente dans la méthode courante, a permis également de mettre en relief le caractère disproportionné du sous emploi dans sa répartition selon le genre.

Le volume horaire hebdomadaire travaillés est beaucoup plus faible chez les femmes que chez les hommes: La comparaison du nombre d'heures effectivement travaillées, au cours de la semaine de référence, illustre, encore une fois, la précarité de l'emploi féminin. Les courbes donnant la répartition des actifs selon le nombre d'heures travaillées montrent des écarts qui sont d'autant plus importants que l'on se situe en zone de plein emploi. On dénombre 5,46 fois plus de femmes dans la population active n'ayant travaillé qu'entre 10 et 15 heures au cours de la semaine de référence. Cet indice n'est plus que de 0,44 pour les personnes ayant travaillé plus de 46 heures. En prenant, arbitrairement, 30 heures comme une limite hebdomadaire en deçà de la quelle un actif est considéré comme sous employé, on relève que cela concerne 58,8% des femmes actives contre seulement 25,5% des hommes.

Les éléments pour éclairer ce diagnostic doivent être recherchés dans plusieurs directions, dont on peut citer, sans prétention d'exhaustivité: (i) le sous-emploi rural, qui règne de par l'importance de la saisonnalité des travaux, l'absence de protection et la faiblesse du salariat. L'accès à cette forme d'emploi donne la priorité à l'homme d'autant plus que la femme rurale est souvent pénalisée par la lourdeur des travaux ménagers, de basse cours, de champs, d'élevage; (ii) l'analphabétisme, plus prononcé chez la femme, qui ouvre moins d'opportunités pour mettre à profit les opportunités épisodiques d'emploi; (iii) l'état matrimonial, particulièrement pour la femme mariée, qui libère moins de disponibilités pour exploiter le temps vacant partiel à des fins productives.

Pour bien mesurer l'exacte nature des inégalités d'accès qui frappent les femmes il faut avoir en mémoire les caractéristiques de l'emploi féminin. Ainsi, trois groupes professionnels regroupent 90 % des femmes dans l'emploi: ouvrières agricoles, professions intermédiaires de la santé et du travail social, employés civils, employés administratifs d'entreprises, employés de commerce et personnels de services directs aux particuliers, alors que ces catégories agrégées rassemblent une proportion moins importante des hommes en emploi. Outre ces distinctions de type hiérarchique, les hommes se répartissent de façon beaucoup plus éclatée entre les différentes professions alors que les femmes se concentrent massivement sur quelques unes d'entre elles et cette concentration tend à s'accentuer avec la progression de l'activité féminine.

Jeunesse et emploi

Les jeunes âgés de 15 à 34 ans représentent un pourcentage très important de la population qui ne va pas cesser de croître jusqu'en 2015 environ[35]. Le chômage des jeunes est une cause majeure

35 Par jeunesse, on entend ici des jeunes âgés de 15 à 34 ans: 15 ans, c'est l'âge légal du travail, 18 ans, c'est déjà au Maroc l'âge légal de droit de vote et 34 ans en raison de l'âge de plus en plus tardif au mariage, et à l'entrée dans la vie active (beaucoup de jeunes diplômés chômeurs ont franchi le cap des 30 ans).

d'exclusion et de marginalisation sociale, d'autant qu'il atteint des jeunes de plus en plus instruits, de plus en plus diplômés et donc de plus en plus exigeants.

Le chômage touche les jeunes plus que les adultes. 17,2% des jeunes de 15 à 24 ans sont chômeurs, soit un taux plus élevé que chez les adultes de 25 à 34 ans, soit 14%. Les tranches d'âge de 35 à 44 ans et 45 ans et plus sont moins touchés, soit respectivement 5,9% et 2,0%. L'évolution des disparités entre chômage des jeunes et chômage des adultes montre que le taux de chômage des jeunes est supérieur à celui des adultes et qu'il s'agit d'une réalité qui perdure. Ce taux de chômage des jeunes, au moins deux fois supérieur au taux de chômage des adultes, est lié en partie à l'effet de loupe de l'indicateur taux de chômage et en partie aux problèmes d'insertion de jeunes sans expérience professionnelle.

Par ailleurs, les écarts entre jeunes et adultes sont plus forts au sein de la population masculine qu'au sein de la population féminine, que ce soit en zones urbaines ou en zones rurales. Ceci ne signifie pas que les jeunes femmes sont plus favorisées que les jeunes hommes puisqu'un ratio moins élevé s'explique principalement par le fait que les taux de chômage des femmes adultes sont, comme ceux des jeunes, à des niveaux élevés et donc plus rapprochés entre eux. C'est dire qu'il s'agit là d'une des nombreuses manifestations de la discrimination des femmes sur le marché du travail[19]. Autrement dit, ce sont les femmes qui, en général, subissent les premières et le plus fortement les crises économiques et leurs conséquences en matière d'emploi (et de sous-emploi).

Un autre indicateur qui permet d'approcher la situation des jeunes est celui qui mesure leur part dans le chômage total. Les données disponibles indiquent un niveau assez élevé de cette part. Ainsi, pour 2007, les jeunes formaient plus du tiers du chômage total urbain (35,5%). Il s'agit là d'un niveau élevé puisque la part des jeunes dans la population d'âge actif n'était, pour la même année, que de 21,3%. Par ailleurs, l'évolution de cet indicateur dans le temps montre une tendance persistante à la baisse de la part des jeunes dans le chômage. De 53,3% en 1984, cette part passe à 41,0% en 1992 et chute à 35,5% en 2005. Cette forte baisse s'explique par l'augmentation des effectifs scolarisés, l'allongement de la scolarité, le retrait du marché du travail et le découragement d'une partie des jeunes, toutes choses que les crises sur le marché du travail ne font qu'accélérer, surtout que la part des jeunes dans la population d'âge actif n'augmente plus.

Sur le front du chômage, les données de l'année 2007 montrent que, sur l'ensemble du territoire, quel que soit l'âge et le sexe, le taux de chômage croît avec le niveau de diplôme, la même chose se vérifiant au niveau de la relation entre chômage et niveaux scolaires. Mais elles montrent surtout que les jeunes sont les plus vulnérables à cet égard puisqu'ils ont des taux de chômage plus élevés que leurs aînés pour chaque niveau de diplôme.

Ces faibles performances du système de formation professionnelle de niveau moyen s'expliquent par de nombreuses raisons dues notamment à la constitution historique de ce système et au rôle qui lui a été historiquement dévolu, à savoir celui de « recycler » les élèves qui n'ont pas pu (ou qui n'ont pas voulu) suivre leur scolarité dans le cycle « normal ». C'est dire que ce système fut pensé moins pour préparer l'insertion professionnelle de ces jeunes que pour remplir le vide social que créait la désaffection scolaire.

Les principaux enseignements que l'on peut tirer de l'évolution des taux de chômage des diplômés de niveau supérieur c'est que la catégorie qui subit le plus le chômage est celle des diplômés des facultés (à l'exception des lauréats des facultés de médecine) avec, à partir du milieu des années 1990, des taux de chômage stabilisés autour de 40%, suivie, avec des taux moins élevés mais en fortes fluctuations, de la catégorie des techniciens et cadres moyens. Ce sont, en revanche, les diplômés des écoles et instituts supérieurs (y compris ceux des facultés de médecine), par ailleurs beaucoup moins nombreux que ceux des facultés, qui s'en sortent le mieux avec des taux à la fois relativement bas et tendant à la baisse depuis une décennie.

Le système d'éducation n'est pas seul en cause dans le chômage des jeunes, le tissu productif pour l'instant s'avère incapable d'incorporer et d'inclure les jeunes demandeurs d'emploi. Les jeunes pauvres non qualifiés sont naturellement moins exigeants en matière d'emplois ou de salaires. En outre, ils arrivent à profiter des possibilités d'insertion dans l'informel grâce aux réseaux familiaux. L'immense majorité des jeunes utilisent les relations familiales et les relations personnelles. Le problème majeur, central, et crucial que doit affronter la nouvelle stratégie d'inclusion de la jeunesse reste et restera encore pendant plusieurs années, l'emploi des jeunes et notamment l'emploi des diplômés et des jeunes lauréats de la formation professionnelle.

L'éducation, la formation et l'emploi

Ces dernières années, le Maroc a accompli des progrès dans l'objectif de la généralisation de l'éducation. Ceci assure déjà que d'ici 2020, le nombre de nouveaux entrants nets sur le marché du travail sans éducation primaire sera réduit à 24 % par rapport à 35 %aujourd'hui. Toutefois, si les taux très élevés de redoublement et d'abandon restent inchangés, la proportion de la population active sans éducation primaire complète ne diminuera que de 7% sur les 35 prochaines années. La réduction des taux de redoublement et d'abandon dans les niveaux secondaire et supérieur est également cruciale. Si ces taux ne sont pas réduits, le nombre de participants à la population active avec un niveau d'éducation secondaire augmentera de plus de 2 millions sur les 35 prochaines années, mais il continuera à ne représenter que 23,2 % du total contre 14 % aujourd'hui. Pour les diplômés de l'éducation supérieure, la situation est encore moins prometteuse. Le taux net escompté de diplômés de l'éducation supérieure n'est que de 150.000. Sans diminution des taux d'abandon dans l'éducation supérieure, la part des diplômés de l'éducation supérieure pourrait même diminuer sur le moyen terme.

A titre d'illustration, si les taux d'abandon, de répétition, de transition et d'entrée à tous les niveaux du système d'éducation s'amélioraient de 50% (e.g. les taux de redoublement sont réduits de moitié ou les taux d'insertion sont doublés), le nombre annuel de nouveaux entrants nets sur le marché du travail sans éducation primaire serait réduit à 6.300 d'ici 2020 (par rapport à 30.700 dans le scénario de référence). De même, le nombre de diplômés de l'éducation supérieure dans la population active totale pourrait passer à 2,3 millions d'ici 2020 par rapport à 591.000 dans le statu quo. Le potentiel d'amélioration est réel mais les changements prendront du temps à se matérialiser. La raison en est en partie le vaste stock actuel de travailleurs non qualifiés.

De meilleurs liens avec le marché du travail exigeront également une diversification de l'éducation secondaire. Ceci implique une meilleure articulation avec le système de FP, qui ne joue pas le rôle d'un filet de sécurité pour ceux qui ne peuvent pas continuer dans le système traditionnel. Ainsi, les diplômes de type FP ont le même statut que le Baccalauréat avec des passerelles bien définies entre spécialisations.

Le SFP a, pendant longtemps reçu des sortants de l'éducation nationale qui, aux termes de l'enseignement général, orientait une grande partie des scolarisés en direction de la formation professionnelle. Ainsi, au cours de la période 1988-97, l'évolution des effectifs de la FP affichait-elle une croissance substantielle, de l'ordre de 39%. Durant cette période, de grandes rigidités liées à la nature de la formation dispensée et à l'évolution rapide des besoins de l'économie entravaient l'insertion effective des lauréats dans la vie active.

Globalement, la mise à niveau du SFP conduit progressivement à une amélioration des performances tout au moins au plan quantitatif. Les effectifs des stagiaires, tout mode de formation confondus, sont en augmentation continue. L'extension des infrastructures et l'optimisation de l'utilisation de la capacité d'accueil permettraient d'accroître l'effectif des stagiaires. Une meilleure adaptation de la formation aux besoins du marché de l'emploi est recherchée grâce à la création, de nouvelles filières de formation.

Le Maroc a entamé des réformes fondamentales du système de formation continue; la question est de savoir si une deuxième génération de réformes est nécessaire. En dépit du fait que l'évidence empirique montre que la formation continue accroît la productivité du travail (et les ventes), seules 20% des sociétés dans le secteur manufacturier forment leurs travailleurs. Seules 3% ont utilisé les instruments développés par le système de FP.

L'Etat s'est lancé dans une réforme du système de l'enseignement supérieur[36]. La stratégie met aussi l'accent sur les carrières professionnelles plus courtes et la diversification des sources de financement -- en mettant en place des prêts étudiants et à travers la promotion du rôle du secteur privé. La stratégie de réforme contient beaucoup d'aspects positifs, mais son exécution est lente.

L'amélioration de la qualité de l'éducation est une autre condition préalable primordiale pour relever les résultats sur le marché du travail, dans le moyen et le long terme. Bien que l'évaluation de la qualité soit difficile, certains indicateurs suggèrent qu'il y a des insuffisances sérieuses. Par exemple, 58% des étudiants marocains n'atteignent pas le repère inférieur dans les tests internationaux en mathématiques et en sciences. Seul 1% atteint le premier repère. La faible qualité se reflète également dans les taux élevés d'abandon scolaire et de redoublement.

Il est important de mentionner, cependant, que la réduction des taux d'échec scolaire et l'amélioration de la qualité ne sont pas suffisantes pour avoir des meilleurs résultats sur le marché du travail. Sans des politiques éliminant les contraintes actuelles à l'investissement, sans innovation, sans une croissance plus rapide et donc sans une accélération de la création d'emplois, un nombre plus élevé de travailleurs qualifiés pourraient simplement augmenter les taux de chômage et/ou baisser les salaires. L'un des enjeux-clés de l'enseignement supérieur et du système de formation professionnelle est de savoir comment faciliter/permettre l'innovation technologique.

4. Les politiques de l'emploi et la réforme du marché du travail

Face au chômage, les pouvoirs publics ne restent pas inactifs; ils développent, selon des modalités diverses, des politiques de l'emploi. Celles-ci peuvent se définir comme l'ensemble des interventions publiques sur le marché du travail mises en œuvre dans le pays, visant à améliorer le fonctionnement et à réduire les déséquilibres qui peuvent y apparaître.

4.1 Politique d'emploi/Stratégie nationale d'emploi

La promotion de l'emploi a été placée au coeur de la stratégie de développement économique et social à travers: d'une part, une démarche générale portant sur l'exploration des voies et moyens d'une croissance forte créatrice d'emplois, l'encouragement de l'investissement et de l'esprit d'entreprise, l'adéquation de la formation aux exigences du marché de l'emploi et, d'autre part, une démarche spécifique consistant dans la mise en place de dispositifs et d'instruments visant l'intégration des chercheurs d'emplois, notamment parmi les chômeurs diplômés dans la vie active. Il s'agit principalement de l'insertion directe, la formation-insertion, l'insertion par la promotion de l'entreprise et la réforme de l'intermédiation au niveau du marché du travail.

La tenue des Assises de l'emploi en septembre 2005, en permettant la mise au point d'un dispositif ciblé de promotion de l'emploi des jeunes diplômés chômeurs, a constitué une avancée importante dans ce domaine.

Les recommandations de ces Assises, dont la mise en oeuvre a déjà été entamée, se résument comme suit:

- l'adaptation des programmes du système éducatif et de formation aux besoins effectifs du pays;
  - la résorption des déficits accumulés par le développement de la formation insertion et

[36] Ces réformes comprennent l'octroi de plus d'autonomie aux universités, la révision des structures de gouvernance, et l'allocation graduelle des budgets sur la base d'indicateurs de performance.

l'organisation de stages d'expérience professionnelle;

- l'encouragement des entreprises à procéder à des recrutements de diplômés par l'octroi d'avantages fiscaux à l'occasion de l'établissement de contrats de premier emploi ce qui leur permettra par ailleurs de renforcer leur encadrement;
- le soutien de l'auto emploi par l'incitation des jeunes à créer leur propre entreprise pour des investissements ne dépassant pas 250.000 DH;
- l'encouragement des Conseils Régionaux à créer leurs propres Fonds pour la promotion de l'emploi à l'échelle locale;
- l'amélioration des modalités de gouvernance du marché du travail par la rationalisation de l'intermédiation à travers la restructuration de l'Agence Nationale de Promotion de l'Emploi et des Compétences et le développement du partenariat entre les secteurs public et privé dans ce domaine;
- la création de l'observatoire de l'emploi qui sera chargé du suivi des politiques de promotion de l'emploi, de leur évaluation et de la proposition de mesures correctives à leur apporter le cas échéant à la lumière des expériences vécues.

La mise en oeuvre du dispositif issue des Assises tenues devrait permettre la création de 200.000 emplois à l'horizon 2008.

Trois objectifs ont été fixes :

- Améliorer l'employabilité des diplômés en chômage de longue durée ayant une formation inadaptée aux besoins du marché du travail ou ne disposant pas d'une expérience professionnelle. Cet objectif devrait être atteint par l'organisation de stages de très courte durée dans les secteurs privé et public leur permettant d'acquérir une première expérience professionnelle. Il devrait l'être aussi par l'organisation de formation complémentaire de courte durée ou de formation de qualification dans des emplois en rapport avec les besoins du marché du travail.

- Développer les compétences et la capacité d'adaptation des travailleurs à l'évolution des emplois, notamment dans les entreprises confrontées à la concurrence étrangère. Il s'agit de préserver l'emploi des travailleurs menacés de licenciements économiques par le développement des actions de reconversion professionnelle et de la formation continue.

- Fournir une assistance technique aux demandeurs d'emploi qui ont la capacité professionnelle de réaliser leur propre projet d'insertion. Il s'agit de faciliter l'embauche directe des diplômés rencontrant des grandes difficultés d'insertion dans la vie active. Cette facilitation serait encouragée par des incitations financières aux entreprises et aux ONG recrutant sur contrat de travail de droit commun ainsi que par des incitations financières aux PME localisées dans les zones économiquement défavorisées en mesure de développer les emplois qualifiés.

4.2 Les politiques actives du marché du travail

Dans le cadre de cette approche, d'importants efforts ont été déployés au cours des dernières années pour donner un contenu pratique à ces orientations. Il s'agit en particulier de l'encouragement des jeunes à créer leurs propres entreprises et de l'appui à la formation – insertion des jeunes diplômés dans la vie active.

La première vague de mesures

Le soutien à l'initiative entreprenariale des jeunes:
Les pouvoirs publics ont mis en place des mécanismes pour la promotion de la création d'entreprises par les jeunes. L'évaluation du dispositif a permis d'identifier les mesures à prendre pour sa modification et la relance des initiatives jeunes pour la création d'emploi[37]. Ces dispositifs de soutien ont permis la création de quelques centaines d'activités. Une des limites de ces projets tient aux difficultés rencontrées pour des raisons diverses: problèmes financiers liés au démarrage, baisse du niveau d'activité, mésentente entre les associés et autres motifs. L'identification des contraintes a révélé un certain nombre de lacunes telles que la faiblesse de l'assistance au jeune entrepreneur, l'indisponibilité et la cherté des locaux ainsi le rôle marginal joué par les organisations et chambres professionnelles dans le parrainage des jeunes promoteurs. Aussi la dynamisation des différents instruments arrêtés à cette fin a-t-elle conduit à la mise en place des programmes de soutien à l'auto-emploi et à l'encouragement des pépinières d'entreprises.

L'appui à l'auto-emploi:
Un grand nombre de jeunes diplômés susceptibles de créer leur propre activité rencontrent des difficultés d'accès au système de financement classique. S'appuyant sur l'expérience concluante menée par des associations de la micro-finance, les pouvoirs publics ont encouragé la dissémination de cette pratique et soutenu les activités d'auto-insertion professionnelle.[38] Depuis la lancement de ce programme (septembre 1999) jusqu'à fin 2003, près de 4000 candidats ont été sélectionnés et un peu plus de 450 dossiers de prêts on été présentés aux établissements financiers.

L'encouragement des stages de formation – insertion:
Les résultats limités enregistrés ont conduit à dynamiser cette mesure par un programme « Action – Emploi » qui prévoit des incitations additionnelles portant en particulier sur l'octroi d'une indemnité d'encadrement à toute entreprise qui s'engage dans ce programme et sur le financement complémentaire pour les stagiaires. Ce programme a visé l'insertion de 100000 jeunes sans distinction de sexe sur une période de quatre années.

Le bilan des mesures de l'emploi n'est pas particulièrement satisfaisant

- Ainsi, pour les stages de formation insertion, depuis 1993, à peine 29000 stages ont été réalisés dont près de 60% des bénéficiaires ont été insérés définitivement à l'issue de leur stage.
- Le programme action-emploi n'enregistre pas de performance meilleures: l'insertion n'a concerné que 66000 jeunes diplômés dans 37000 entreprises d'accueil dont plus de 90 de PME de moins de 50 salariés, celles de moins de 10 salariés ont accueilli 60% des bénéficiaires du PAE, 48% des insertions sont dans le secteur des services. 70% des insérés ont bénéficié d'une formation complémentaire.
- L'exécution des Contrats spéciaux d'insertion n'a débuté que récemment. On a recensé à peine 1176 contrats d'accès à l'emploi, 163 contrats de développement de l'emploi et 105 contrats d'emploi d'utilité sociale

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37 Il en est ainsi de: (i) la loi 16/87 instituant des mesures d'encouragement aux diplômés de la formation professionnelle; (ii) la loi 36/87 (modifiée par les lois 14/94 et 14/96) relative à l'octroi de prêts de soutien aux promoteurs titulaires d'un diplôme d'enseignement supérieur ou d'un diplôme de formation professionnelle ou d'une attestation certifiant une qualification professionnelle; (iii) la loi 13/94 (modifiée par la loi 15/96) relative à la mise en œuvre du fonds pour la promotion de l'emploi des jeunes ne remplissant pas les conditions de diplôme ou d'attestation prévues par la loi 36/87.

38 Le programme d'appui à l'auto-emploi qui est juridiquement fondé sur les loi n°36/87 et 13/94, prévoit en plus de l'octroi de prêt conjoint Etat/Secteur bancaire (allant jusqu'à 90% du programme d'investissement qui ne doit pas excéder 250.000 DH), une assistance - conseil financée par l'Etat et assurée par des organismes conseil agréés. Le programme a été mis en place pour prendre en considération les différentes entraves au succès des jeunes entrepreneurs, tout particulièrement au niveau de l'encadrement, par le recours à des cabinets – conseil pour accompagner les jeunes entrepreneurs au cours des différentes étapes de réalisation du projet.

- L'effectif des bénéficiaires des programmes de formation qualifiante ne dépasse pas 1591 jeunes, 839 ont été insérés, dont 180 recrutés sur des postes budgétaires, soit un taux d'insertion de 67%.
- Le programme d'appui à l'auto-emploi a permis le création de quelque 730 entreprises en 2002 générant plus de 2670 emplois. Les dispositions de ce programme ont été intégrées dans la nouvelle loi no 53/00 formant charte des petites et moyennes entreprises (Fonds de garantie jusqu'à 85% des prêts octroyés par les banques).

Les politiques de l'emploi mises en œuvre ont été centrées sur le segment du marché du travail des diplômés de niveau supérieur. Du côté demande de travail, leur philosophie consiste en la promotion de la demande de travail en provenance du secteur privé. Les mesures prises à cet égard concernent à la fois l'auto-emploi et l'insertion par les stages dans des entreprises existantes. Quant aux mesures d'insertion par les stages le principal dispositif est le Plan d'Action- Emploi (PAE), elles ont pour objectif principal de rendre attractif le travail « qualifié » des jeunes diplômés, notamment par la réduction des coûts salariaux et une plus grande flexibilisation.

Du côté offre de travail, les actions menées visent à améliorer l'employabilité des jeunes diplômés en cherchant à combler le déficit de leurs formations et à les rapprocher d'autant des besoins des entreprises et du monde du travail. Des actions de court terme concernent les formations complémentaires. Les actions de long terme concernent, quant à elles, la réforme du système éducatif et de la formation professionnelle. L'autre axe d'intervention publique concerne les structures d'intermédiation, notamment par l'instauration en 2000 de l'ANAPEC.

Les politiques publiques d'emploi souffrent aussi de la dispersion et du manque de coordination entre ses différents intervenants publics. C'est ainsi que nombre d'actions, axées sur la relation formation-emploi, sont distribuées entre divers ministères et départements. Ces politiques qu'on peut qualifier de sectorielles sont à distinguer des politiques publiques de l'emploi, plus transversales, et qui sont axées sur le thème de la formation-insertion, et sont du ressort de la Direction de l'Emploi et de l'ANAPEC.

Les difficultés d'évaluation des politiques publiques d'emploi ne s'illustrent pas seulement à travers ce premier défaut de coordination. Elles se font sentir aussi dans le manque d'études de suivi et d'évaluation au sein de chacune des instances impliquées et concernant les différentes mesures appliquées (qui doivent être évaluées isolément mais aussi conjointement aux autres mesures en cours).

Ces politiques qui se focalisent sur le marché du travail des jeunes diplômés font abstraction des interactions qui existent entre celui-ci et le marché du travail des sans diplômes (et de ceux ayant un faible niveau d'instruction). Or, de telles interactions existent à l'évidence et un certain degré de substituabilité existe entre ces catégories, d'autant que les entreprises peuvent parfois préférer un sans-diplôme avec une expérience professionnelle à un diplômé sans aucune expérience et doté d'une formation théorique loin de ses préoccupations.

La nouvelle stratégie de l'emploi

La nouvelle stratégie de l'emploi se construit sur un ensemble de nouveaux programmes actifs du marché du travail (PAMT) lancés en 2005. Les avantages fiscaux et les subventions dont bénéficieront les trois nouveaux PAMT au cours des trois années de leur fonctionnement planifié (2006-08) visent la création de 200.000 nouvelles opportunités d'emploi (comparé aux 106.800 opportunités créées par les programmes de 1988-2004). Une comparaison entre les principales similitudes et différences entre les programmes précédents et les nouveaux PAMT font ressortir que le nombre total de nouveaux bénéficiaires au cours de la courte période de 3 ans (2006-08) est environ deux fois plus important que le nombre total de bénéficiaires concernés par les mesures précédentes sur une période de 16 ans.

Les nouveaux PAMT ont été mis en œuvre récemment. Seul des résultats quantitatifs sont disponibles avec peu d'évaluations de la mise en œuvre.

Le programme IDMAJ (Insertion) est un programme qui bénéficie de l'expérience d'une série de mesures comparables précédemment mises en oeuvre[39]. L'objectif opérationnel du CPE pour les jeunes diplômés a été identifié comme étant “l'amélioration de la susceptibilité d'emploi des jeunes diplômés à la recherche du travail ” et ce par le développement de compétences professionnelles au cours de leur contrat auprès de l'entreprise. Le développement de l’employabilité constitue un objectif valable tenant en compte l’inadéquation entre les compétences de beaucoup de jeunes diplômés et celles demandées par le marché de travail.

La réussite de cet objectif ne sera possible que si les emplois financés sont largement compatibles avec les compétences déjà acquises par les lauréats et les besoins spécifiques aux entreprises. Ce qui soulève la question de savoir si cette inéquation est due aux compétences acquises par les diplômés ou à des demandes spécifiques des entreprises. Ce problème est spécialement pertinent pour les PME ayant expérience limitée en matière de gestion des ressources humaines.

Le programme TAEHIL (Formation): Comme dans le cas de IDMA, les programmes de formation et de requalification ne sont pas complètement nouveaux. L'objectif des mesures dans le cadre de ce programme est “d'améliorer l'employabilité de jeunes diplômés à la recherche d'un premier emploi et nécessitant une formation ou de requalification complémentaire afin d'être en mesure de décrocher un emploi[40].

Comme dans le cas d'IDMAJ, le déficit en matière de compétences peut résulter de plusieurs raisons qui ne sont pas toutes axées sur plus de formation. Une inadéquation possible peut survenir, des différences d’une part entre les programmes d'éducation ou de formation suivis par les diplômés et, d’autre part, les besoins actuels du marché du travail. Les besoins croissants des nouveaux secteurs pour lesquels le système éducatif a produit des capacités insuffisantes ou même pas de capacités du tout, contrastent avec l'absence d'un système de conseils efficaces en matière de carrière ou le manque d'intérêt par les employeurs concernant les étudiants dans certains secteurs (par exemple la construction).

La question clé pour ce programme reste la nécessité de développer des programmes de formation conçus sur la base de compétences et de qualifications correctement identifiées, et de disposer des méthodes pédagogiques et d’un contenu permettant de former les candidats pour qu'ils puissent satisfaire les besoins identifiés. L'identification des besoins en compétences et l’adéquation des profils. La qualité et la pertinence de l'identification des besoins en compétences, ainsi que le contenu et l'organisation des programmes de formation correspondants sont nécessaires mais à l'heure actuelle l'Observatoire National n'est pas encore opérationnel.

Le programme MOUKAWALATI (Mon entreprise) a été lancé en mai 2006. Il a été élaboré sur la base des programmes d’appui ayant été mis en œuvre en faveur de la création d'entrepris[41]. Deux principales faiblesses ont été identifiées dans les programmes précédents En premier lieu, concernant le financement des jeunes entrepreneurs, le système bancaire est très réticent d’apporter l’appui nécessaire pour couvrir les besoins financiers des petites entreprises nouvellement créées. En deuxième lieu, le soutien offert aux jeunes entrepreneurs avant et après la création de très petites entreprises a été très limité et de ce fait, généralement insuffisant pour le développement et la pérennité des entreprises nouvellement créées. L'expérience internationale montre qu'un soutien

39 Celles-ci incluent l’“Action-Emploi” lancée en 1997 pour une durée de 4 ans et suivie par le “Contrat pour l'Insertion” lancé en 2001. Les deux programmes étaient structurés selon des mécanismes similaires au CPE (dégrèvements fiscaux sur salaires allant jusqu'à 4500 DH pour la durée du contrat et avec 12 mois additionnels si l’entreprise embauche le bénéficiaire).

40 L'employabilité constitue par conséquence l'élément de base des programmes IDMAJ et TAEHIL. Cependant, IDMAJ donne priorité à "l'employabilité opérationnelle” pour les diplômés prêts à intégrer le marché du travail, alors que le TAEHIL vise à développer le "potentiel pour l'employabilité" par la formation aux compétences recherchées sur le marché du travail.

41 Tels que Crédit Jeune Promoteur, le Programme d’Appui à l’Auto Emploi) et le Fonds de Garantie Jeune Entrepreneur.

permanent constitue une des clés de la réussite des très petites et petites entreprises nouvellement créées.

MOUKAWALATI fait face à ces deux problèmes**.** Par ailleurs, MOUKAWALATI met en place d'autres mécanisme pouvant contribuer à la création et au développement de très petites entreprises sous forme de*:* liens avec de grandes entreprises via des activités pouvant aider à la création des PME; coordination avec les secteurs identifiés comme étant prioritaires pour le développement économique (Emergence), par des fonds régionaux de développement et la coopération avec des instituts de recherche; développement de pépinières d'entreprises pour aider à la création de nouvelles entreprises; simplification des procédures relatives à la création d'entreprises y compris la réduction du capital social nécessaire pour établir une SARL

Le programme MOUKAWALATI prévoit que chaque entreprise nouvellement créée devrait créer en moyenne trois postes à l'horizon de fin de 2008. Ces chiffres peuvent paraître optimistes. De plus la création d'emplois ne s'effectue de façon durable que dans le temps, le problème principal étant la capacité des nouvelles entreprises à créer des emplois à long terme quantifiés comme faisant partie du secteur formel.

Evaluation de l'impact de la nouvelle stratégie

Les programmes d'emploi récemment mis en œuvre méritent un suivi de leur impact sur les populations ciblées. Le Programme Idmaj (Insertion) est destiné à permettre aux stagiaires bénéficiaires d'acquérir une formation complémentaire dans les lieux de travail de nature à faciliter leur insertion dans la vie active. Son objectif est de permettre l'insertion de 105.000 chercheurs d'emploi durant 2006-2008 et de 230.000 durant 2009-2012. Le bilan fait ressortir une réalisation de 120.076 insertions depuis janvier 2006, date d'entrée en vigueur du programme, à fin décembre 2008 (53% de garçons et 47% de filles) dont 35 % constituée par des contrats à durée déterminée. La majorité des insertions l'ont été dans les activités de service (60%), l'industrie a recueillie un peu plus du tiers (34%), le reliquat se réparti entre l'agriculture et le BTP. La ville Casablanca a offert plus du quart des postes d'insertion (27%), Tanger (17%) et Rabat-Salé (16%) interviennent en seconde et troisième position, le reste se réparti sur les autres régions du territoire.

Le programme Taehil (Qualification) consiste quant à lui en l'amélioration de l'employabilité des demandeurs d'emploi par l'acquisition des compétences professionnelles pour occuper des postes d'emploi dûment identifiés ou potentiels. Il vise l'amélioration de l'employabilité de 50.000 bénéficiaires durant 2006-2008 et de 100.000 durant 2009-2012. Il est bâti sur trois dispositifs de formation. Le premier est celui de la Formation Contractualisée pour l'Emploi qui devrait permettre aux chercheurs d'emploi (à profil peu adapté) d'acquérir les compétences requises pour occuper des emplois identifiés. La population cible est constituée de chercheurs d'emploi diplômés inscrits à l'ANAPEC ayant été sélectionnés par une entreprise ou une association. A fin décembre 2008, le nombre de personnes ayant bénéficié des formations contractualisées pour l'emploi a atteint 10 409. Le second est celui de la Formation Qualifiante ou de Reconversion qui consiste à faciliter l'insertion des jeunes diplômés en difficulté d'insertion par l'acquisition des compétences professionnelles et l'adaptation de leurs profils aux besoins du marché de l'emploi. Il s'adresse aussi aux chercheurs d'emploi diplômés inscrits à l'ANAPEC, nécessitant une réorientation vers des formations permettant de développer des compétences demandées par les entreprises. A fin décembre, le nombre d'opportunités de formation de reconversion identifié serait de 7426. Le troisième dispositif, celui de la Formation dans les métiers de l'Offshoring répond à l'objectif de réussir le recrutement des ressources humaines par le développement de leurs compétences en répondant aux besoins en formation continue des salariés. La formation dispensée selon un plan de formation validé conjointement par l'employeur et l'opérateur de formation. La mise en œuvre de ce dispositif a permis le recrutement de 1600 personnes par les entreprises de l'offshoring et 30 personnes par des entreprises du secteur de l'aéronautique.

Un grand espoir a été mis sur le programme Moukawalati. Ne se donnait-il pas l'ambitieux objectif d'assurer la pérennité progressive du tissu économique régional par la création et l'accompagnement de 10.000 entreprises à l'horizon 2012? La population cible est constituée aux demandeurs d'emploi diplômés, âgés entre 20 et 45 ans, porteurs de projets dont le montant d'investissement ne dépassant pas 250.000 Dhs. Le bilan du programme est décevant: su 13195 candidats présélectionnés, un peu plus de 6000 ont été formés ou sont en cours de formation. 3788 projets ont été déposés auprès des banques dont 1274 projets financés et autofinancés et à peine 1005 entreprises ont été démarrées. Le dispositif se voulait être un instrument dédié assurant à un accompagnement global et intégré avec des procédures améliorées et simplifiées. L'approche sur laquelle il a été bâti postulait une fédération et une implication de l'ensemble des partenaires et un pilotage à tous les niveaux du processus. Mais un certain nombre d'insuffisance se sont manifestées dans la mise en œuvre du programme: une proximité restreinte, une insuffisance de sensibilisation des agences bancaires par rapport au respect du guide pratique Moukawalati. Le résultat a été une faible affluence et des performances plus que médiocres. Un plan de relance a été dessiné pour revigorer le programme: ouverture à tous les porteurs de projets, élargissement du réseau des guichets et renforcement de leurs capacités; dynamisation du pilotage régional et local; sensibilisation des agences bancaires locales; organisation d'une campagne de communication basée sur les cas de réussite.

4.3 Changements récents dans la législation et projet de réforme

La persistance du chômage au Maroc a poussé bon nombre d'analystes et décideurs à se demander si cette détérioration n'est pas liée aux mécanismes juridiques régissant le fonctionnement de ce marché. Les questionnements focalisent sur l'efficience des modes de détermination des prix du travail, l'opportunité de l'existence même de l'institution des salaires minima dans un pays marqué par un accroissement des flux de population active à la recherche d'un emploi, et à la pertinence des augmentations de ses salaires minima au delà du seuil tolérable imposé par les capacités d'absorption des entreprises.

Par ailleurs, faisant de l'embauche la préoccupation majeure de la politique économique, les pouvoirs publics ont récemment fait adopter une nouvelle législation du travail dont certaines innovations telles la flexibilité et la libéralisation des mécanismes d'embauche ouvrent des perspectives intéressantes. Ce nouveau Code permettra-t-il enfin de supprimer les rigidités qui, pendant longtemps, avaient inhibé les potentialités du marché du travail et permettre au plus grand nombre des candidats d'avoir plus d'opportunités en matière de recherche de l'emploi?

Les mutations globales qu'a connues l'environnement sociétal et qui sont générées par des facteurs à la fois endogènes et exogènes ont favorisé l'adoption d'une nouvelle législation du travail dont le processus d'élaboration s'étale sur environ trois décennies. Le projet du code fut adopté par le Parlement en Juillet 2003. Le nouveau code du travail constitue un cadre juridico-institutionnel de la gestion de relations du travail et participe à l'amélioration de l'environnement juridique interne de l'entreprise. Son contenu s'est largement inspiré des conventions internationales du travail ratifiées et plus particulièrement celles afférentes aux droits fondamentaux de l'économie mondialisée.

Les apports du nouveau Code

Les apports du code du travail précisent les droits et les obligations des parties à la relation du travail et portent sur: les relations individuelles du travail, les rapports collectifs du travail, la négociation collective, les conditions du travail, l'hygiène et la sécurité du travail, la protection des femmes et des enfants, l'institutionnalisation des modes de règlement des conflits du travail, l'emploi.

D'abord, des équilibres sont bâtis notamment entre la liberté syndicale et la liberté du travail qui sont toutes les deux entourées de garanties et de responsabilités dans leur exercice. De même, la dualité de la représentation (représentation professionnelle élue et représentation syndicale au sein de l'entreprise) et qui est à l'origine de beaucoup de divergences est atténuée. Pour un meilleur encadrement de la relation du travail, le code du travail impose à tout employeur occupant dix salariés l'obligation d'élaborer un règlement interne en concertation avec les représentants des travailleurs et de veiller à sa mise en œuvre.

Ensuite, le code du travail structure les négociations collectives et assure leur institutionnalisation. Elles se déroulent périodiquement et à plusieurs niveaux (entreprise, national, conventions collectives). Il formalise les négociations collectives dans les conventions collectives. Quant aux questions du licenciement collectif et de la fermeture de l'entreprise ou de l'établissement, elles demeurent subordonnées à autorisation, mais les représentants des travailleurs sont associés au processus de leur examen. Dans le même ordre d'idées, le code du travail institutionnalise le règlement de conflits collectifs en créant deux principaux modes: la conciliation et l'arbitrage. De surcroît, il confie à l'agent chargé de l'inspection du travail une fonction de pré-conciliation des conflits individuels du travail selon des procédures préétablies. Par ailleurs, les nouvelles règles contenues dans le code du travail- portant sur les procédures de recrutement, les licenciements individuels et collectifs, l'indemnisation des salariés et institutions chargées de la gestion du travail- auront un impact direct sur le marché du travail et contribueront à sa rationalisation et à sa régulation.

Enfin, avec la légalisation de la création des "agences de placement privé" et l'intérim qui coexisteront avec l'Agence nationale pour l'emploi et les compétences (ANAPEC) créée par la loi, la réglementation consacre la libéralisation des modes de gestion du marché du travail. Le Maroc a ainsi déjà ratifié la convention internationale du travail n° 181 sur les agences privées de l'emploi, mettant ipso facto fin au monopole du placement public.

Cependant, et tout en privilégiant la voie libérale, le nouveau code met en place des gardes-fous pour éviter des dérapages. D'une part, le chapelet des mesures prises dans le cadre de ce nouveau code a pour finalité de protéger la partie fragile du marché du travail; il s'agit de la réduction du renforcement des normes d'hygiène et de sécurité et revalorisation de la médecine du travail, de la réglementation des périodes d'essai pour les contrats à durée indéterminée, de l'encadrement juridique du contrat à durée déterminée et de la fixation du montant des indemnités en cas de licenciement abusif, de l'incrimination de l'emploi des enfants avant 15 ans en alourdissant la sanction en cas de violations, et du renforcement du statut de la femme salariée en la protégeant contre le licenciement lorsqu'elle est en état de grossesse. D'autre part, la fixation du salaire minimum demeure entre les mains des pouvoirs publics.

Les nouvelles règles du jeu
Deux étapes sont à distinguer: avant l'adoption du code du travail et après son entrée en vigueur le 8 juin 2004.

(i) Avant la promulgation du code, le système des relations professionnelles demeure marqué par le conflit et la logique de bras de fer comme modalité dominante de résolution des conflits de travail, la négociation collective constituant une procédure résiduelle.

(ii) Le code du travail mis en oeuvre le 8 juin 2004 prend acte des évolutions ayant marqué, au cours des deux dernières décennies du siècle dernier, les relations professionnelles, de la reconfiguration du champ social, des nouveaux enjeux économiques, technologiques et organisationnels, ainsi que des résultats cumulés du dialogue social engagé, notamment, à partir du milieu des années 1990.

Le processus d'élaboration et de négociation de ce nouveau code s'est étalé sur environ trois décennies[42]. Le contenu de ce nouveau cadre juridico-institutionnel de la gestion des relations du travail s'est largement inspiré des conventions internationales du travail ratifiées par le Maroc et plus particulièrement celles afférentes aux droits fondamentaux du travail.

D'abord, le code du travail impose à tout employeur occupant dix salariés l'obligation d'élaborer un règlement interne en concertation avec les représentants des travailleurs et de veiller à sa mise en œuvre. Ensuite, le code du travail structure les négociations collectives et assure leur institutionnalisation. Elles se déroulent périodiquement et à plusieurs niveaux (entreprise, national, conventions collectives). Il formalise les négociations collectives dans les conventions collectives. Quant aux questions du licenciement collectif et de la fermeture de l'entreprise ou de l'établissement, elles demeurent subordonnées à autorisation, mais les représentants des travailleurs sont associés au processus de leur examen. Dans le même ordre d'idées, le code du travail institutionnalise le règlement de conflits collectifs en créant deux principaux modes: la conciliation et l'arbitrage.

De surcroît, il confie à l'agent chargé de l'inspection du travail une fonction de pré-conciliation des conflits individuels du travail selon des procédures préétablies. Un reprofilage des missions de cette institution se dessine, elle est appelée à accompagner les réformes entreprises et à être sollicitée pour apporter son concours en vue de faire aboutir les négociations collectives et les différents rounds du dialogue social.

Enfin, avec la légalisation de la création des « agences de placement privé » et l'intérim qui coexisteront avec l'Agence Nationale Pour l'Emploi et les Compétences (ANAPEC) créée par loi, la réglementation consacre la libéralisation des modes de gestion du marché du travail. Le Maroc a ainsi déjà ratifié la convention internationale du travail no 181 sur les agences privées de l'emploi, mettant ipso facto fin au monopole du placement public.

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La difficulté de gérer la réforme du code du travail

Le Code du travail a été adopté en Juillet 2003, son entrée en vigueur est encore tributaire des textes d'application à prendre par l'autorité gouvernementale. Environ quarante articles de ce code nécessitent, selon les cas, des décrets ou des arrêtés. Autant dire que beaucoup reste à faire au point de vue réglementaire pour que le nouveau code du travail donne la plénitude de ses effets. Ces quarante articles traitent des différents volets du travail: il s'agit de certaines activités traditionnelles, du contrat à durée déterminée, de certaines formalités à respecter par les employeurs, du contour des conditions du travail, des modalités de création des services autonomes de médecine du travail, et des textes d'application en faveur des relations professionnelles.

Contrairement aux attentes, il semblerait que ce nouveau Code ait plutôt accru la rigidité du marché du travail et le coût de la main d'œuvre. C'est ainsi que la réduction du temps de travail hebdomadaire de 48 à 44 heures sans diminution de salaire, combinée avec une augmentation du

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42 C'est au cours du dernier round du dialogue social entamé au premier trimestre de 2003 que le projet du code dans sa version de 1995 (dont certains articles constituaient des points de discorde) a été réexaminé dans une sous-commission tripartite. Un consensus a été obtenu sur sa nouvelle mouture.

coût horaire d'environ 20% s'est traduite par une augmentation du coût horaire du travail d'environ 20%. De plus, les dispositions du Code ont accru la rigidité des rémunérations du personnel et rendu les licenciements plus coûteux. Toutefois, le Code introduit plus de flexibilité dans le domaine des contrats d'intérim et de sous-traitance.

En termes de flexibilité du marché du travail, l'étude « Doing Business » de la Banque Mondiale montre que les entreprises marocaines rencontrent plus de difficultés de recrutement que les pays du pourtour de la Méditerranée et ceux de l'Europe de l'Est. Le contraste est particulièrement fort avec l'Egypte, la Syrie et la Jordanie. La rigidité de l'emploi au Maroc est une des plus élevées des pays européens et arabes. L'index de rigidité est une combinaison des indices sur les difficultés de licencier, la difficulté de licencier et la rigidité du temps de travail. La rigidité du marché du travail se traduit aussi par le recours à la sous-traitance. Elle se manifeste aussi par un transfert d'activités vers le secteur informel. En effet, afin de contourner ces rigidités, près d'un tiers des entreprises sous-traitent une partie de leur production, surtout lorsqu'elles ont à faire face à une augmentation temporaire de leur charge de travail. La sous-traitance est souvent utilisée pour contourner les restrictions au licenciement.

Tableau. Embaucher et licencier des travailleurs (2010)

Indicateur	Maroc	Moyenne régionale	Moyenne OCDE
Difficulté d'embaucher	89	21.3	26.5
Rigidité du nombre d'heures de travail	40	22.1	30.1
Difficulté de licencier	50	30.0	22.6
Rigidité en cours d'emploi	60	24.5	26.4
Coût du licenciement (en semaines de salaires)	85	53.4	26.4

Source: Etude Doing Business. Banque Mondiale. 2004

Ce tableau montre les difficultés que rencontrent les employeurs au Maroc pour embaucher et licencier les travailleurs. Les indicateurs utilisés mesurent la difficulté de recruter et de licencier les travailleurs, quel est le degré de rigidité des réglementations ou du temps de travail, et à quel point il est difficile de licencier un travailleur dont on a plu besoin. Les indicateurs couvrent: la disponibilité de contrats à temps partiels ou à durée déterminée, la réglementation du temps de travail, la législation sur le salaire minimum et sur les conditions d'emploi. Chaque indicateur est mesuré sur une échelle de 0 à 100, les valeurs supérieures reflétant les systèmes les plus rigides. L'indicateur de Rigidité de l'Emploi est une moyenne de trois indicateurs. Pour le Maroc, cet indicateur global est de 60, à comparer avec la moyenne régionale de 39,8% et la moyenne OCDE de 36,1%. Le coût du licenciement est calculé sur la base du nombre de semaines de salaire à payer en indemnités et en pénalités de licenciement.

Le nouveau code du travail a introduit d'importants changements dans le domaine clé des licenciements. Les coûts de licenciement au Maroc restent parmi les plus élevés de la région et du monde. Le coût du licenciement au Maroc est 3 fois plus élevé que la moyenne des pays de l'OCDE. La nouvelle législation clarifie les conditions qui régissent le licenciement d'un travailleur dans deux circonstances—soit pour des raisons disciplinaires ou pour « raisons technologiques, structurelles ou économiques ». Les procédures administratives pour licencier des travailleurs sont longues et fastidieuses. A l'heure actuelle, il est nettement moins coûteux pour l'entreprise de licencier les jeunes travailleurs. En outre, les indemnités de licenciement ne s'appliquent pas aux départs volontaires, ce qui les rend attrayants mais n'offrent pas de protection—ni d'incitation—aux travailleurs qui souhaitent partir volontairement.

Le coût élevé des indemnités de licenciement et l'incertitude concernant les procédures qui accompagnent le processus légal rendent d'autres modalités informelles plus efficaces que le licenciement officiel lorsqu'il s'agit de licencier des travailleurs. Les indemnités de licenciement ne sont versées qu'à une petite proportion seulement des travailleurs licenciés. La réduction des coûts de la main-d'oeuvre et la détermination de normes efficaces pour des procédures de recrutement et de licenciement plus flexibles sont les deux enjeux les plus pertinents de la réforme du pacte du travail; cependant, compte tenu du pouvoir de négociation limité du Gouvernement dans un environnement extrêmement sensible sur le plan politique, la question est de savoir comment faire.

4.4 Les stratégies alternatives

La stratégie visant à accélérer la création des emplois qualité exige d'intégrer et de coordonner les politiques à cinq niveaux: politiques macro-économiques et d'investissement, politiques d'éducation et de formation, politiques de protection sociale, politiques de réglementation de l'emploi Les questions principales à aborder à ces différents niveaux peuvent être récapitulées comme suit:

Politiques macro-économiques et d'investissement. Le Maroc a besoin de diversifier son économie et de réallouer des ressources vers des secteurs à haute valeur ajoutée et à plus forte productivité. Au delà du fait de maintenir une macroéconomie stable et un progrès continu pour créer un climat d'affaires qui favorise les investissements et la concurrence, il est important de revoir les réglementations qui pénalisent le développement du secteur des exportations. Les réformes du marché du travail sont nécessaires mais elles sont toujours des composantes insuffisantes des mesures requises pour relever le défi de l'emploi au Maroc**.** Le Maroc a besoin d'une diversification productive de son économie appuyée par un meilleur environnement pour les entreprises et une ouverture soutenue de l'économie. Ceci implique de la persévérance dans les ajustements interdépendants de l'économie, d'une économie dominée par le secteur public en faveur d'une économie créatrice d'emploi dominée par le secteur privé, et d'une économie fermée en faveur d'une économie plus ouverte

Politiques d'éducation et de formation. Ces politiques sont importantes à deux niveaux. Tout d'abord parce qu'elles influent l'accumulation du capital humain et donc le potentiel de croissance du pays. En second lieu, parce qu'elles peuvent faciliter ou entraver l'innovation technologique et la croissance de la productivité. Dans l'enseignement de base et secondaire, le principal défi aujourd'hui consiste à réduire les taux d'échec scolaire et à accélérer les efforts visant à améliorer la qualité de l'éducation. Dans le secondaire un système plus intégré et plus diversifié est nécessaire. Dans l'enseignement supérieur et la formation professionnelle, il y a un besoin de continuer les réformes au niveau des mécanismes de financement et les structures de gouvernance pour améliorer l'efficacité externe. En général, les politiques sont nécessaires pour mieux aligner l'offre de l'enseignement supérieur et technique sur les besoins d'un secteur privé en transformation, passant d'une situation de compétences de faible niveau à des compétences de niveau supérieur. Ceci implique des actions au niveau des réglementations fiscales et du travail, l'effort devant porter sur la protection des travailleurs plutôt que sur la protection de l'emploi. Ceci implique aussi de redresser l'inadéquation des compétences sur le front de la demande et de l'offre.

Protection sociale Les politiques de protection sociales sont importantes dans une stratégie intégrée visant à favoriser la croissance et la création d'emplois parce qu'elles affectent l'appropriation privée en facilitant ou en entravant la gestion efficace des ressources économiques. Dans le cas du Maroc, cinq questions doivent être abordées: (i) comment contrôler la hausse du coût fiscal et social qui peut avoir un impact négatif important sur l'emploi formel; (ii) comment éliminer les distorsions qui réduisent les taux de participation dans la population active; (iii) comment améliorer la portabilité de droits acquis entre les secteurs; (iv) et comment passer d'un système de protection du revenu basé sur la protection du travail à un système basé sur l'assurance et l'épargne; et (v) comment élargir la couverture de la protection sociale.

La majorité des travailleurs marocains ne sont pas protégés par la législation du travail et la sécurité sociale. 78% de la population active marocaine, ou 8,3 millions de travailleurs et leur famille, n'ont pas accès aux avantages de la sécurité sociale. Etant donné qu'au Maroc un grand nombre de travailleurs opèrent à de faibles niveaux de productivité, ce qui limite la capacité des entreprises à assumer les coûts du passage au secteur formel (spécifiés dans le code du travail, dans la législation régissant la sécurité sociale, et dans la législation fiscale), un régime d'assurance chômage pourrait être développé pour encourager le passage au secteur formel. Pour les entreprises qui opèrent à de très faibles niveaux de productivité, proche du niveau de subsistance, d'autres mécanismes tels que l'assistance ciblée directe peuvent s'avérer plus efficaces. Il faut donc établir un juste équilibre entre les finances publiques et la promotion de l'emploi formel par le biais d'incitations fiscales. Le grand nombre de travailleurs marocains non protégés est un réel défi pour l'avenir en termes du nombre important de personnes sans revenu vieillesse adéquat et assurance maladie, coûts qui en fin de compte peuvent être pris en charge par l'Etat.

Politique de réglementations du travail. Sur ce plan, il y a lieu d'examiner les procédures et de reconsidérer le montant de l'indemnité de licenciement**.** Les longues réglementations du travail sont coûteuses pour les entreprises et doivent être simplifiées. Dans sa version actuelle, le nouveau code du travail imposera diverses contraintes sur la capacité des entreprises à s'ajuster aux chocs extérieurs. Premièrement, les procédures pour le licenciement de travailleurs pour raisons économiques sont complexes et sujettes aux pressions politiques. Deuxièmement, si la requête de licenciement est acceptée, le Code impose toujours des coûts élevés sous forme des indemnités de licenciement. A moins que les procédures ne soient simplifiées et que le montant soit reconsidéré, environ une entreprise sur quatre seulement continuera à appliquer des mécanismes formels de licenciement.

5. Impact des flux migratoires sur les marchés de travail nationaux

L'émigration marocaine à l'étranger qui est un phénomène fort ancien. Après être passée par différentes étapes, elle connaît actuellement une diversification de ses destinations, un changement de son profil et de ses caractéristiques démographiques et socio-économiques, et se généralise à l'ensemble du territoire national. L'émigration internationale marocaine est allée croissante avec une forte accélération depuis les années 1960. Elle a connu un infléchissement important depuis le milieu des années 1970, sous tendu par deux phénomènes liés: un changement rapide et quasi-soudain de la nature de la migration et une transformation progressive du profil des candidats à l'émigration. En effet, elle a commencé par une migration d'essence provisoire et ponctuelle et a par la suite subi de profondes mutations pour devenir une migration permanente, acquérir le caractère de clandestinité et s'étendre aux cerveaux du pays.

5.1. Estimation et caractéristiques de l'émigration depuis 1990

Selon les statistiques du Ministère des Affaires Etrangères et de la Coopération, l'ensemble des Marocains résidant à l'étranger se monte à plus de trois millions en 2007. L'effectif de la communauté marocaine à l'étranger est passé de 160 mille individus à 680 mille entre 1968 et 1982, de 1,9 millions à 2,6 entre 1991 et 2002, et enfin de 3 à 3.2 individus entre 2004 et 2007.

L'évolution de l'émigration marocaine s'est accompagnée de l'apparition de tendances nouvelles qui se sont intensifiées au cours du temps[43].

43 Voir travaux de Khachani.

- l'émigration dans le cadre du **regroupement familial** va prendre le relais de l'émigration individuelle. Par son ampleur, ce processus qui a bénéficié surtout aux migrants anciennement installés en Europe a changé **la finalité du projet migratoire** qui de provisoire devient **définitif**, il a par ailleurs complètement transformé les structures par âges et par sexes de la communauté marocaine; ceci engendra un rajeunissement et surtout une féminisation de la population émigrée marocaine en Europe.
- Parallèlement à ce flux migratoire, se développait une autre forme d'émigration, **l'émigration saisonnière**. Insignifiante jusqu'à la fin des années 60, elle s'amplifiait progressivement jusqu'au début des années 80, en réponse à une demande accrue de main d'œuvre dans certains secteurs d'emploi temporaire comme l'agriculture, le bâtiment, la restauration et les hôtels. Entre 1972 et 1981, elle porta en France sur 126.000 personnes. Le phénomène déclina par la suite et ne dépassa pas les 4.000 personnes en 1990.
- A partir de **la moitié des années 80**, **l'émigration féminine** a connu un développement important. Contrairement à la phase du regroupement familiale, l'émigration féminine devient individuelle et autonome, elle est le fait de femmes surtout célibataires, parfois divorcées ou mariées avec ou sans enfants. Ces femmes souhaitant améliorer leur niveau de vie arrivent dans les pays d'accueil à la recherche d'un travail. De nouvelles destinations sont ciblées: l'Italie et l'Espagne en Europe et la Libye et les pays du Golf dans le monde arabe.

Le profil par âge et par sexe

Le profil démographique et socio-économique de la population issue de l'émigration marocaine a changé au cours des deux dernières décennies. La structure par sexe et par âge est devenue plus équilibrée, le niveau d'instruction et de qualification plus élevé. On relève également une baisse du taux d'activité des émigrés marocains et une meilleure représentativité spatiale et sociale de la population du pays d'origine.

En effet, le profil de la communauté marocaine immigrée en Europe a beaucoup changé au cours des dernières décennies. Il tend notamment vers une structure par sexe et par âge plus équilibrée, en raison, d'une part, de la féminisation et du rajeunissement de la population immigrée par l'arrivée massive des femmes et des enfants dans le cadre du regroupement familial et de l'émigration féminine autonome apparue récemment et, d'autre part de son ancienneté à l'étranger. Ce phénomène est d'une très grande importance à cause de ses implications socio-démographiques et économiques.

En fait, l'enquête du CERED[44] qui s'est intéressée à la structure par sexe des chefs de ménage migrants enquêtés, révèle que 5,9% seulement étaient des femmes contre 94,1% d'hommes. Il est vrai que la structure par sexe des 2832 chefs de ménage migrants enquêtés montre une nette prédominance des hommes, mais la proportion enregistrée par les femmes représente un changement de structure tout à fait remarquable par rapport aux décennies passées. En effet, à l'inverse des migrations anciennes où la quasi-totalité des principaux vecteurs de la migration étaient des hommes, les migrations récentes font apparaître de plus en plus de femmes.

Par pays de résidence actuel, on constate que les femmes migrantes chefs de ménage sont relativement plus nombreuses dans les anciens pays d'immigration comme la France (7,8%) et la Belgique (6,1%). Toutefois, cette proportion, nettement faible de femmes chefs de ménage, s'explique en partie par le fait qu'en dépit de l'intérêt accordé à la question féminine, à partir des

44 Enquête sur «l'Insertion Socio- Economique des Marocains Résidant à l'Etranger dans les Pays d'Accueil » réalisée par le CERED en août- septembre 2005, auprès d'un échantillon de 2832 Marocains résidant à l'étranger.

années 1980, la femme marocaine est restée, pour longtemps, fondamentalement l'acteur culturel de l'immigration et l'homme son acteur économique.

En effet, l'image de référence de la femme marocaine immigrée a été pendant les premières décennies du regroupement familial, une image de mère de famille nombreuse et donc inactive. Son entrée en activité dans l'espace économique des pays d'accueil constitue un phénomène nouveau, intervenu beaucoup plus tard que l'homme, et par conséquent sa visibilité dans cet espace n'est devenue effective que durant les dernières décennies.

Les immigrés marocains en Europe étaient jusqu'au début des années 1970 constitués d'hommes seuls, jeunes et célibataires. Actuellement, la structure du ménage immigré est dominée par le couple, et particulièrement le couple avec enfants. Selon l'Enquête sur les Marocains Résidant à l'Etranger réalisée en 2000, environ 78% des émigrants avaient moins de 30 ans au moment du départ et 65% étaient célibataires. Par contraste, aujourd'hui plus de 90% d'entre eux ont 30 ans et plus, et plus de 86% sont mariés. Alors que 90% partaient seuls à l'étranger, près de 65% vivent actuellement en couple avec enfants. Ce changement résulte à la fois de la migration de regroupement familial et des mariages mixtes dans les pays d'immigration.

Le profil par qualification

Selon le niveau d'éducation, on enregistre un important recul des analphabètes au moment du départ. La fermeture des frontières, intervenue dès 1974, a eu un effet sélectif et a permis de changer le profil d'un migrant analphabète vers un migrant scolarisé, ayant souvent bénéficié d'une formation professionnelle, voire supérieure. Si les analphabètes constituaient près de 50% des émigrés avant les années 1960, ils n'en représentaient plus que 20% durant la seconde moitié de la décennie 1970. Plus tard, cette proportion s'est abaissée autour de 10% des émigrés. Le niveau primaire a augmenté durant la même période de 15,4% à 37,6%, pour ensuite baisser dans les années 1980 et 1990 au profit des niveaux d'éducation plus élevés. Le niveau secondaire n'a cessé d'augmenter, passant de 8% avant 1960 à 44% dans les années 1990. Le niveau supérieur est apparu durant la seconde moitié de la décennie 1970 avec 2,4% pour augmenter sensiblement et atteindre près de 16% au cours des deux dernières décennies.

Les données de l'enquête du CERED montrent qu'une proportion importante des MRE résidant dans les pays de la communauté européenne a déjà fréquenté l'école. La part des chefs de ménage ne possédant aucun niveau d'instruction n'est que de 17.7%. Toutefois, des différences apparaissent selon les pays d'accueil et surtout selon les générations de migrants. L'analyse par pays d'accueil montre que la part des « sans instruction » est sensiblement plus élevée chez les MRE de France (48,2%) et d'Espagne (25,8%) et ans une moindre mesure en Italie (10,8%). Les MRE disposant d'un niveau d'instruction supérieur sont plus concentrés en France (51,5%), en Espagne (12,3%), en Belgique (11,8%) et en Italie (11%).

Mais, c'est surtout en fonction des générations de migrants que varient les niveaux de scolarisation des MRE. Les données montrent une nette progression de la scolarisation d'une génération à une autre chez la population immigrée marocaine d'Europe. Ce résultat tient d'abord aux nouvelles configurations des flux de la migration marocaine. Si dans les années 1960 et 1970, cette migration a été essentiellement une migration de main d'œuvre impliquant des personnes analphabètes, les années 1990-2000 sont marquées par une forte diversification des profils et des flux migratoires. En plus de la migration estudiantine qui s'est manifestée massivement depuis les années 1980, les deux dernières décennies sont marquées par l'arrivée de nouveaux migrants de plus en plus instruits.

S'agissant des niveaux de diplômes acquis par les MRE, il ressort des données de l'enquête que même si les MRE sont de plus en plus scolarisés, leur niveau de diplôme n'est pas assez élevé. Environ le tiers (35,2%) des MRE ne possèdent aucun diplôme et 36,3% ont un diplôme et certificat de l'enseignement fondamental. Seulement 1.5% des chefs de ménage interrogés déclarent posséder un diplôme de techniciens ou de cadres moyens et 1.9% possèdent des diplômes de qualification professionnelle.

L'analyse des degrés de qualification professionnelle des MRE confirme ces tendances. Les MRE exerçant un emploi sans qualification occupe la première place. Ils représentent 36,9% de l'ensemble des chefs de ménage enquêtés. Les ouvriers qualifiés constituent 28.8% et les ouvriers spécialisés forment 16.8%. Les techniciens et les cadres ne constituent respectivement que 6.8% et 8.5%.

Ainsi, la proportion élevée des MRE chefs de ménage « sans qualification » montre qu'une part non négligeable des MRE est faiblement qualifiée occupant les plus bas niveaux de la stratification professionnelle et sociale dans les pays d'accueil. Toutefois, des différences importantes existent selon les pays de résidence. La situation la plus critique est celle des nouveaux pays de l'émigration marocaine vers l'Europe: Espagne et Italie. En Espagne, environ un MRE sur deux est sans qualification (49%). En Italie, la proportion des MRE sans qualification atteint 43.6%.

Les MRE actifs semblent subir les lois d'un marché de travail segmenté dans les pays européens d'accueil qui les cantonnent dans des activités au bas de l'échelle sociale, exigeant peu de qualification et recourant relativement à l'emploi à temps partiel.

La répartition de l'ensemble des MRE actifs des deux sexes selon les professions principales montre que près de 71% sont employés dans des professions de faibles qualification en tant qu'artisans et ouvriers qualifiés des métiers artisanaux » (24,5 %), « manœuvres non agricoles, manutentionnaires et travailleurs des petits métiers » (18.6%), « employés » (18,0 %) et « cadres moyens » (10,2%). Les professions exigeant des niveaux élevés de qualification, tels que « membres des corps législatifs, élus locaux, responsables hiérarchiques de la fonction publique, directeurs et cadres de direction d'entreprises » et «cadres supérieurs et membres des professions libérales », ne sont exercées que par 7,5 % des MRE actifs. Le reste des professions occupe 21,5% des MRE actifs

L'étroitesse du taux d'activité féminin des MRE, parait être due à la prépondérance de la part des femmes sans diplôme ou ayant un diplôme du niveau fondamental, soit 68.0% des cas. Par rapport aux femmes non diplômées, le taux d'activité féminine augmente de près de 22 points en pourcentage pour les diplômés de l'enseignement secondaire. Cette augmentation atteint 29 et 45 points en pourcentage respectivement pour les diplômées de supérieur et en qualification professionnelles et assimilées, et culmine pour les techniciennes, soit une augmentation de près de 52 points en pourcentage. L'examen de la féminisation de l'emploi selon le statut professionnel montre que 27% des MRE actifs salariés sont des femmes, contre 17% pour les actifs indépendants et 9,4% pour les employeurs

Approche par pays de destination

La population marocaine migrante est dispersée mais fortement représentée dans certains pays de l'Union Européenne, et, particulièrement, en France, aux Pays Bas, en Belgique et en Allemagne, ainsi que dans de nouveaux pôles d'attraction, comme l'Italie et l'Espagne où les ressortissants marocains constituent désormais la première communauté étrangère. Depuis le milieu des années 1970, l'émigration marocaine a connu une mutation profonde, caractérisée par les tendances suivantes:

- une partie de l'émigration marocaine s'est orientée vers les pays arabes pétroliers;
- la migration de main-d'oeuvre a perdu de son importance et l'on trouve plus d'inactifs (les retraités, les femmes et les enfants) dans la population issue de l'immigration;
- l'émigration régulière se fait surtout en vertu du regroupement familial et elle concerne essentiellement des femmes et des enfants;
- l'émigration de travailleurs saisonniers a décliné;
- l'émigration irrégulière ou clandestine a pris de l'ampleur;

- l'exode des cerveaux, enfin, est relativement récent et représente une tendance moins important que les précédentes

La destination privilégiée des émigrés marocains demeure les pays de l'Union Européenne, second foyer mondial de l'immigration après l'Amérique du Nord. L'émigration marocaine vers cet espace est devenue importante depuis les années 60. Un peu plus de deux millions et demi de marocains vivent en Europe en 2007. Ils représentent le gros (85,9%) des Marocains résidant à l'étranger. Les Amériques viennent en seconde position en concentrant environ 7,1% de la communauté marocaine résidant à l'étranger en 2007, suivies par les pays arabes avec une proportion de 6,7%. Enfin, une partie beaucoup plus petite des Marocains se trouve dans les pays d'Afrique sub-saharienne.

Sur l'ensemble des ressortissants marocains installés à l'étranger en 2007, près de 32,6% se trouvent en France, pays traditionnel d'immigration, ce qui représente 37,9% de ceux qui vivent en Europe. L'Espagne et La Belgique viennent respectivement en deuxième et en troisième position avec 18,4% et 12,9% des ressortissants marocains en Europe suivies par l'Italie (12,6%), les Pays–Bas (11,8%) et l'Allemagne (4%). Les autres pays d'Europe abritent des proportions relativement négligeables de Marocains.

La France est de loin le principal lieu de l'émigration marocaine. La France est aussi une zone de transit importante des immigrés marocains vers les autres pays européens[45]. Les immigrés marocains sont arrivés massivement dans les années 1970. Parmi les quelque milliers de Marocains résidant en France, les hommes sont légèrement plus nombreux que les femmes: soit respectivement 54,5% et 45,5%. Le groupe d'âges le plus représenté est la tranche la plus âgée de la population active: les 40-59 ans, dont les hommes en constituent 57% à l'échelle nationale.

Un des phénomènes les plus marquants de ces dernières années en matière de migration des marocains vers l'étranger est certainement la nouvelle orientation géographique des flux vers de nouveaux pôles d'attraction, en l'occurrence l'Espagne et dans une moindre mesure l'Italie. Jusqu'à une date récente l'Espagne ne constituait guère une destination privilégiée pour les Marocains mais plutôt un simple pays de transit devant conduire vers les pays d'accueil traditionnels. La relance économique de l'Espagne et son adhésion à l'Union Européenne ont suscité une demande accrue de main-d'oeuvre, d'où cet afflux important de migrants au cours de la dernière décennie. Un des aspects qui caractérise la population des Marocains en Espagne est la jeunesse de cette communauté. En 2005, environ 85% des Marocains avaient moins de 45 ans dont 54,6% avaient entre 26 et 45 ans, 17,9% avaient entre 17 et 25 ans et 12,5% avaient moins de 16 ans.

L'émigration des Marocains vers les Pays Arabes est relativement récente (mise à part l'Algérie) et fait suite, en général à des accords passés entre le Maroc et ces pays, en l'occurrence la Libye, l'Arabie Saoudite, les Emirates Arabes Unies et l'Irak. La quasitotalité de l'émigration marocaine dans ces pays pétroliers est une émigration de travailleurs, à l'opposé de l'Europe, qui a dépassé ce stade en accueillant aussi les membres des familles des travailleurs.

La région arabe est devenue une destination importante pour les travailleurs migrants. En 2007, la région accueillait un sur dix des migrants internationaux dans le monde et un sur quatre de ceux installés dans les régions moins développées. Les pays arabes ont connu entre les années 1990 et 2007, un accroissement net de quelques sept millions de migrants internationaux, ce qui porte le total à près de 20 millions. En 2007, cinq pays figuraient parmi les principales destinations arabes des migrants marocains: l'Algérie, la Libye et la Tunisie, puis deux pays du Golfe (Arabie Saoudite

45 Selon l'enquête de INSEA parue en 2000, les Marocains ayant immigré via la France représentent 28,6 % en Angleterre, 27 % en Hollande, 9,4 % en Belgique, 11,9 % en Italie. Seule l'Espagne du fait de la proximité géographique avec le Maroc a reçu directement une part importante des immigrés marocains, soit 86,4 %. La proportion des marocains ayant migrés en Espagne via d'autres pays européens est faible: 3 % via la France, 3 % via la Hollande et 2,3 % via l'Italie.

et Emirats Arabes Unies). En 2007, les migrants marocains installés dans les pays arabes pétroliers, représentaient une faible proportion **de la** population migrante de la région.

Six sur dix de tous les migrants marocains dans la région arabe vivent dans le Maghreb. Les migrations vers l'Algérie ou la Tunisie sont anciennes. Par contre, c'est à la suite à l'augmentation du prix du pétrole de 1972 que la destination vers les Pays du Golfe s'est manifestée. La région entière est rapidement devenue tributaire de main-d'œuvre étrangère. Plusieurs facteurs contribuaient à ce besoin massif de main-d'œuvre étrangère: faible participation de la population active, particulièrement des femmes; population autochtone peu nombreuse (environ 6.1 millions pour la région CCG); niveaux d'alphabétisation et d'instruction bas; revenus élevés provenant de sources autres que le travail pour les citoyens du pays

Tableau 5.1. Population Marocaine Résidant à l'Etranger

Pays de résidence	**1993**	**1997**	**2002**	**2005**	**2007**
Europe	**1 275 567**	**1 609 373**	**2 185 894**	**2 740 000**	**2 837 654**
Allemagne	85 156	104 051	990 000	108 355	130 000
Belgique	145 363	199 647	214 859	354 161	285 000
Espagne	65 847	199 422	222 948	503 171	547 000
France	678 917	722 000	1 024 766	1 036 909	1 131 000
Italie	91 699	146 460	287 000	345 764	379 000
Pays-Bas	164 546	274 641	276 655	324 511	278 000
Pays Arabes	**196 017**	**219 192**	**231 876**	**213 034**	**281 631**
Algérie	54 576	47 998	63 000	62 822	80 000
Arabie Saoudite	9 000	20 000	11 973	27 567	28 000
EAU	2 992	4 782	8 359	13 040	13 040
Libye	102 413	112 026	120 000	78 852	120 000
Tunisie	20 000	24 840	16 414	11 000	26 000
Asie et Océanie	**731**	**1 424**	**3 522**	**1 566**	**4 037**
Amériques	**70 000**	**84 000**	**155 432**	**226 196**	**161 216**
Canada	45 000	60 000	79 000	100 000	60 000
Etats-Unis	25 000	24 000	85 000	125 000	100 000
Afrique subsahar.					**8 061**
Total	**1 545 036**	**1 917 217**	**2 582 069**	**3 185 386**	**3 292 599**

Source: Données enregistrées par les consulats du pays. Fondation Hassan II

Le développement de la migration clandestine

La migration clandestine s'est développée après l'arrêt de l'immigration en Europe au milieu des années 1970, en réponse à la fermeture progressive des frontières européennes. Du fait de sa proximité géographique, le Maghreb, et en particulier le Maroc, est devenu un point de départ pour un grand nombre de migrants clandestins. L'Espagne et l'Italie constituent leur destination privilégiée.

Les mesures d'arrêt de l'immigration ont eut des effets pervers, ils ont engendré le développement de l'émigration illégale; les réseaux clandestins prennent ainsi le relais des circuits légaux. L'évolution récente du phénomène a été marquée par l'apparition de nouveaux profils d'émigrés clandestins; les changements constatés dans cette forme d'émigration se sont opérés au niveau de quatre paramètres[46]:

46 Voir pour plus de détails les travaux de M. Khachani

- **Le sexe**: la migration clandestine, masculine au départ est devenu mixte, de plus en plus de femmes tentent l'aventure dans les mêmes conditions difficiles que les hommes.
- **L'âge**: des enfants mineurs émigrent dans la clandestinité. Se cachant dans des camions remorques ou sous des cars ou dans les containers, leur présence est devenue visible notamment en Espagne et en Italie.
- **Le niveau d'instruction**: les candidats à l'émigration clandestine qui étaient avant des personnes analphabètes ou ayant un niveau de formation professionnelle généralement bas, sont de plus en plus instruits avec une proportion de diplômés et de lauréats d'écoles de formation professionnelle.
- **Les régions d'origine**: les candidats à l'émigration clandestine sont originaires non seulement de différentes régions du Maroc mais également de certains pays du pourtour méditerranéen et de plus en plus de l'Afrique subsaharienne (libération, 2000)

Selon le Ministère de l'Intérieur Marocain, les interceptions des migrants clandestins sont de plus en plus fréquentes et confirment une recrudescence du phénomène, passant de 24.245 cas en 2000 à 36.251 en 2003. Pour la première fois en 2003, le nombre d'arrestations de migrants clandestins en provenance de l'Afrique subsaharienne a dépassé celui des nationaux, avec une différence du simple au double (12.400 contre 23.851). Par ailleurs, le nombre de personnes interceptées par les autorités espagnoles dans le détroit a atteint plus de 60.000 personnes depuis 1999. Quant aux migrants clandestins décédés ou disparus lors de la traversée du détroit, les estimations avancées oscillent entre 8.000 et 10.000 victimes entre 1989 et 2002.

Les contingents de migrants clandestins qui transitent par le Maroc sont originaires d'une quarantaine de pays africains. Toutefois, les pays dont les ressortissants sont les plus nombreux à être arrêtés sont, par ordre d'importance, le Mali, le Nigeria, la Guinée et la Sierra Leone. Enfin, depuis peu, le Maroc semble être devenu un pays d'immigration, dans la mesure où un nombre croissant des migrants subsahariens qui transitent par le Maroc optent pour une installation durable dans différentes régions du pays.

Depuis 1992, la coopération maroco-espagnole en matière de politique migratoire se concentre sur deux questions en particulier: celle de la réadmission des ressortissants de pays tiers (essentiellement subsahariens) d'une part, et des mineurs isolés d'autre part. Dans cette perspective, la stratégie de Madrid est claire. Il s'agit de faire du Maroc un Etat tampon: soit le contraindre à accepter de réadmettre tous les immigrés illégaux en provenance de ces côtes et de l'obliger à protéger ses frontières au Sud, contre les entrées irrégulières de Subsahariens, et au Nord, contre les départs de « pateras » à destination de l'Espagne.

Cependant, le Maroc montre depuis 1992 une certaine réticence à se faire le gendarme des frontières sud de son voisin. Pour quelles raisons? D'abord parce que l'émigration est pour le royaume une soupape sociale et politique indispensable. Ensuite parce que le contrôle de l'émigration est coûteux. Enfin, parce qu'il constitue depuis 12 ans un moyen de pression non négligeable pour le gouvernement marocain au moment même où celui-ci essaye de négocier un rapprochement avantageux avec l'Union Européenne.

L'Union Européenne a lancé un programme de lutte contre l'immigration clandestine à l'origine, dont la mise en oeuvre à été confiée à l'Espagne, en collaboration avec des pays émetteurs et de transit des immigrés clandestins, essentiellement le Maroc. Un projet, "Sea Horse", a été arrêté. L'objectif principal du projet est de "renforcer la coopération entre les pays d'origine, de transit, et de destination" de l'immigration clandestine pour une lutte plus efficace à l'origine contre les mafias du trafic des êtres humains[47].

Le programme bénéficie d'un financement "initial" de deux millions d'euros et sa mise en oeuvre a été confiée à la Garde Civile. Etalé sur trois ans (2006-2008). Le programme, qui s'inscrit dans le cadre de l'initiative européenne "Routes Migratoires", est mené en collaboration entre l'Espagne, le Maroc, la Mauritanie, le Cap Vert, le Sénégal, l'Italie, l'Allemagne, le Portugal, la France et la Belgique. Le projet vise, à travers l'appui financier du programme communautaire AENEAS, à établir dans les pays affectés par le phénomène de l'immigration clandestine des "politiques efficaces de prévention du trafic des êtres humains", à "développer des relations de dialogue sur les questions migratoires avec le Maghreb et l'Afrique Subsaharienne" et à "appuyer et impliquer le Maroc, la Mauritanie, le Cap Vert et le Sénégal" dans la lutte contre ce phénomène[48].

Dans le cadre de ce programme, de Centres régionaux de surveillance maritime seront créés dans les villes espagnoles de Las Palmas, aux îles Canaries (Atlantique), Algesiras, dans le sud (Détroit de Gibraltar), et Valence, dans l'est du pays (Méditerranée), avec un Centre national de coordination à Madrid. Des sessions de formation seront organisées au profit des officiers directement impliqués dans la lutte contre l'immigration clandestine dans les pays africains concernés.

A relever qu'en 2005, 11.797 immigrés clandestins seulement ont pu atteindre les côtes espagnoles à bord de pateras (embarcations de fortunes), contre 15.675 en 2004, soit une baisse de 24,7% la plus importante diminution depuis 1999. Cette baisse a été plus notable pour les Iles Canaries qui ont enregistré une réduction de 43,43% du nombre des clandestins arrivés à l'archipel à bord de pateras. Cette baisse s'ajoute à une réduction de 18% en 2004. Ces résultats ont été attribués à "l'intensification de la collaboration avec le Maroc, essentiellement à travers l'échange d'informations et le renforcement des patrouilles communes", ainsi qu'aux "mesures prises par le ministère de l'intérieur, dont le Système intégral de surveillance extérieure (SIVE)". En 2006, le gouvernement espagnol a prévu un budget de 30 millions d'euros pour renforcer le SIVE[49].

A toutes ces actions, s'ajoute l'intensification de l'échange d'informations avec les pays de l'Afrique de l'Ouest sur les activités des mafias qui utilisent des bateaux "négriers" pour le transport d'un grand nombre de clandestins vers les Iles Canaries.

La migration de retour au Maroc

La tendance au retour d'une partie des émigrés marocains est à la baisse, tandis que les signes d'un établissement dans les pays d'accueil sont de plus en plus sensibles. Au départ, les migrants, pour la plupart des hommes seuls sans qualification particulière, partaient avec l'idée de retourner tôt ou tard au Maroc, voire dans leur village de naissance. Le retour définitif était l'issue normale de l'émigration et l'émigré marocain était moins enclin à engager des démarches de naturalisation que l'émigré tunisien, et surtout que l'algérien. Plus tard, vers le début des années 1970, la tendance à l'installation dans les pays d'accueil commença à s'affirmer parmi les émigrés Marocains: en France d'abord, puis dans les autres pays d'ancienne migration tels que la Belgique, les Pays-Bas et l'Allemagne. L'émigration allait progressivement prendre des proportions considérables et peser de tout son poids sur la vie des familles.

Le migrant marocain allait de plus en plus fréquemment rester au pays d'accueil, y prolonger son séjour, voire même en acquérir la nationalité afin de se prémunir contre d'éventuels risques. Les

47 Le projet prévoit un renforcement des patrouilles mixtes de contrôle des côtes entre la Garde Civile espagnole et la Gendarmerie Royale marocaine, l'échange d'officiers de liaison et le lancement de patrouilles mixtes avec les gardes-côtes mauritaniens. L'île de Fuerteventura, dans l'archipel des Canaries, accueillera les officiers de liaison marocains et mauritaniens, alors que d'autres officiers de liaison marocains seront affectés à Almeria, un port de l'Est de l'Espagne.

48 Des réunions annuelles Europe-Afrique sont prévues, avec la participation d'Europol, de la Commission Européenne et de l'Agence européenne de contrôle des frontières extérieures (FRONTEX).

49 Un réseau de radars plantés le long des côtes sud de l'Espagne et une partie des côtes canariennes.

migrants, dont une majorité s'étaient mariés au pays et avaient des enfants, commençaient à ressentir le besoin de faire venir leur famille dans les pays d'accueil, où ils envisageaient de s'établir.

Selon le Recensement de 1994, l'effectif des migrants de retour s'est élevé à quelques 117.000 personnes, soit un peu moins de 0,5% de la population totale du pays et de 5% de l'ensemble de la population issue de l'émigration. Parmi ces migrants de retour, 83,5% sont installés en milieu urbain. A titre de comparaison, le recensement de 1982 et de l'Enquête nationale démographique à passages répétés de 1986/88 indiquaient respectivement 68.000 migrants marocains de retour définitif de l'étranger entre 1975 et 1982, et 33.000 durant la période 1986-88.

Un fait mérite d'être signalé, c'est la chute enregistrée par les retours dans les années 1970-74, période durant laquelle la France prépara, puis commença d'appliquer, des mesures de restriction de l'immigration. Ces mesures produisaient l'effet inverse de celui escompté par la France: en réduisant la tendance au retour, elles stabilisaient les migrants en France et, par le biais du regroupement familial, elles aboutissaient à augmenter la population issue de l'immigration au lieu de la réduire.

Le gros des migrants de retour au Maroc provient de France (38%), pays abritant la plus grande communauté marocaine à l'étranger. L'Algérie, pays voisin, vient ensuite avec 22% des retours. Les mouvements de population entre les deux pays sont très anciens. Le voisinage et les liens historiques, souvent de famille, entre les populations des deux pays en sont la cause principale. Les autres pays dont proviennent les migrants de retour se classent dans le même ordre que les pays d'émigration.

Les migrants de retour ne sont pas tous natifs du Maroc. Plus des 2/5 d'entre eux, soit 42%, sont nés à l'étranger, dont 17% en Algérie et 10% en France. Les autres pays, hormis l'Espagne (3%), les Pays- Bas et la Belgique (2%), ne sont pas nettement représentés. Ces natifs de l'étranger sont souvent des jeunes: 30% ont moins de 15 ans et seulement 4% plus de 60 ans. Enfin, plus de la moitié des migrants de retour enregistrés par le recensement de 1994 étaient revenus au pays depuis moins de 10 ans.

5.2 Eléments d'analyse de l'impact de flux migratoires sur les marchés de travail nationaux

La migration exerce des effets importants sur le marché du travail des pays d'origine et de destination, qui seront interprétés différemment selon l'environnement socio-économique. L'impact positif ou négatif de la migration sur une société et sur l'économie dépend en grande mesure des conditions politiques et socio-économiques tant du pays d'origine que du pays de destination.

Les effets de la migration sur le processus de développement des pays en développement peuvent s'évaluer en analysant les changements qu'elle provoque souvent dans certains secteurs ou à certains niveaux. L'effet de la migration sur les excédents de main-d'oeuvre des pays en développement peut être positif. Toutefois, faute d'une planification correcte, l'émigration peut provoquer des pénuries de main-d'oeuvre, particulièrement de main-d'oeuvre qualifiée dans certains secteurs de l'économie des pays d'origine, et devenir une source de tension et de conflit entre les Etats.

L'impact sur l'emploi (demande de travail, incitation au travail…)

L'ambiguïté des relations entre migration et situation du marché du travail national, que le taux de chômage synthétise, fait écho:

- aux théories du marché du travail: Les migrations peuvent être un moyen de faciliter l'adéquation de l'offre et de la demande de travail. Dans ce schéma, la migration est motivée par l'emploi et la hausse des migrations peut conduire à une baisse des taux de chômage en diminuant le chômage frictionnel. Des travaux ont été réalisés pour étudier la motivation des demandeurs de migration. Ils sont conclusifs sur certains aspects.

- aux débats sur les effets de l'immigration Les questions sont généralement les suivantes: un flux de migration peut, par une réduction de la population active à la recherche de travail, exercer une diminution le taux de chômage; un effet d'éviction qui favoriserait les populations autochtones, en terme d'accès à l'emploi, de conditions de travail, de rémunération;

Des observations ou analyses sur les marchés régionaux d'emploi (les bassins d'emploi) les plus émetteurs seront-elles concluantes? Les corrélations spatiales (importance des flux migratoires, faiblesse du taux de chômage) seront-elles concluantes? Les liens de corrélation ne sont pas forcément des liens de causalité. Les migrants viennent-ils forcément des régions où le chômage est le plus élevé? La migration a-t-elle pour effet de renforcer l'incitation au travail (rareté, rémunération…) ou conduit-elle, au contraire, à baisser l'incitation au travail (effets des transferts financiers sur le revenu des foyers ruraux)?

Les deux côtés du marché du travail ne sont pas indépendants. En particulier, les migrations et l'emploi peuvent être liées. Mais, le flux migratoire et le taux d'activité ne sont pas nécessairement corrélés.

La littérature économique récente sur l'impact de la migration sur le pays d'origine n'a pas réussi à analyser les effets de la migration sur les taux de chômage et de salaire surtout dans les zones urbaines. Elle se limite à l'étude de l'impact d'un seul type de flux migratoire, essentiellement la migration internationale, sur le marché du travail dans le pays d'origine et montre que la migration internationale réduit le taux de chômage et/ou augmente le taux de salaire. A l'examen toutefois, on s'aperçoit que les marchés de travail peuvent être affectées simultanément par des flux entrants et sortants de travailleurs.

A l'aide d'un MEGC détaillée appliquée à l'économie marocaine, une étude a montré que, si nous tenons compte simultanément de l'émigration marocaine vers l'Union Européenne, l'immigration subsaharienne vers les villes marocaines et la migration rural-urbain, l'impact sur le marché du travail marocain urbain désagrégé par catégories socioprofessionnelles est ambigu.

Une cartographie superposée des flux migratoires et du chômage régionaux auront –elles une capacité explicative? Peuvent-elles suggérer des appréciations sur les dynamiques en œuvre sur les marchés du travail locaux, donc sur les déterminants du chômage. C'est ce que nous allons essayé d'appréhender à travers une approche des bassins d'émigration les plus importants au Maroc[50].

La répartition régionale des effectifs de l'émigration, au niveau du Maroc, faisait ressortir la persistance des grands foyers d'émigration rurale vers l'Europe, à savoir le Nord Est (Rif central et oriental, Basse Moulouya) avec 45% des travailleurs, le Sud- Ouest (plaines du Sous et montagnes du Haut et de l'Anti Atlas occidental) avec prés de 40%, et les Oasis du versant sud du Haut Atlas et Figuig, avec 11%.

Si jusqu'aux années 60 l'émigration vers l'Europe était surtout rurale et concernait des régions essentiellement répulsives pour cause de fragilité environnementale et de pression du peuplement, avec le début des années 70 s'amorça un nouveau profil socio économique et régional du phénomène d'émigration. Les foyers de l'émigration commençaient déjà à se généraliser à l'ensemble des régions du pays, avec toutefois la prédominance des flux issus des deux foyers traditionnels, le Sud-Ouest et le Nord-Est, et l'émergence de la zone littorale commandée par les grandes agglomérations urbaines (Casablanca, Rabat et Kénitra), comme nouvelle région émettrice.

50 Cette réflexion s'appuie sur et puise son information du rapport de Mrs Mohamed Berriane et Mohamed Aderghal: Etat sur la recherche sur les migrations internationales. Equipe de Recherche sur la Région et la Régionalisation (E3R). Faculté des Lettres et des Sciences Humaines. Rabat. Country Paper Morocco 2008. Préparé pour le programme Perspectives Africaines sur la Mobilité Humaine, financé par la Fondation MacArthur.

Le Souss: Une émigration intense et précoce
Dans cette région[51], l'économie agricole traditionnelle y était fort contrastée: des îlots où des rubans irrigués horticoles (localisées autour des sources et puits ou le long des oueds) se distinguaient au milieu des vastes étendues sèches à agriculture extensive, le plus souvent vouées aux parcours des troupeaux ovins et caprins. Toute la région est sèche et ses ressources ainsi que ses activités économiques traditionnelles sont basées sur les diverses technologies de mobilisation des eaux autres que pluviales en vue d'irriguer.

L'Etat est intervenu en force dans le Souss: des périmètres irrigués modernes ont vu le jour[52]. C'est dans ces zones irriguées modernes (par pompage ou par barrages) que le secteur agro-business a pris racine. Il s'appuie sur des moyens techniques et financiers importants, mais ne concerne nullement la population locale, car il est le fait de catégories d'entrepreneurs allogènes[53]. En revanche, les anciennes zones de cultures vivrières traditionnelles connaissent un déclin et ont été désertifiées sous l'effet conjugué de l'assèchement dû au tarissement du niveau des nappes souterraines (en raison du surpompage); et de l'hémorragie de la population active masculine, responsable de la friche sociale qui tend à s'y généraliser.

Dans ce contexte le phénomène d'émigration d'une grande partie de la population active masculine constitue un fait majeur qui intervient pour permettre le rétablissement de l'équilibre population-ressources dans cette région. L'émigration y est un phénomène très ancien: vers les villes du Maroc, mais aussi, très tôt, vers l'Europe (surtout vers la France). Déjà au début des années quatre-vingts, un foyer sur deux, en moyenne, dépendait des remises financières des émigrés, et cette proportion demeure globalement valable aujourd'hui. Mais compte tenu de son antériorité, le Souss compte davantage aujourd'hui de « rémigrés » rentiers que d'émigrés actifs ayant encore des attaches solides avec leur zone de départ.

Une région ou l'émigration est la plus intense au Maroc: le Nord-Est (Province de Nador).
Parmi les régions rurales traditionnelles marocaines, le Rif Oriental et, secondairement, le Maroc du Nord-Est représentent, chronologiquement, la seconde grande zone de recrutement des émigrés en direction des pays de la Communauté Européenne, mais, quantitativement, la première[54]. Durant la période 1970-1973, cette zone a occupé la première place pour ce qui est du nombre absolu de départs.

Le Rif Oriental est marquée par un faible potentiel naturel et, surtout, par le caractère résiduel de l'irrigation traditionnelle. Mais malgré la menace permanente de la sécheresse, malgré la marginalisation qui l'a longtemps frappé, le Rif Oriental reste un pays fortement peuplé. Contrairement au Souss par exemple, l'économie locale basée principalement sur l'activité agricole n'a pas beaucoup changé. Le pourcentage des ruraux sans terre est estimé entre 30 et 40%; ceux qui ont des terres vivent dans de très petites exploitations (moyenne de 2 à 3 ha par exploitation). En outre, compte tenu des irrégularités climatiques, des faibles possibilités d'irrigation, du caractère nonextensible des terres arables (contraintes de relief et des sols), la production agricole locale devient insuffisante. Déjà vers 1970, on estimait qu'elle ne pouvait assurer que 4 à 5 mois de subsistance; la situation s'est aggravée depuis.

Depuis longtemps la main-d'oeuvre locale a pris l'habitude de se diriger vers les chantiers et les fermes de colonisation (20 à 25% des actifs partaient en direction de l'Algérie). A partir des années

51 C'est un vaste triangle de terres planes comprises entre les montagnes du Haut Atlas au Nord, l'Océan Atlantique à l'Ouest et les massifs de l'Anti-Atlas qui la ferment au Sud et à l'Est.

52 autour de Taroudant (le projet dit Souss-Amont: 7.500 Ha), le périmètre de l'Oued Issen (irrigué par le barrage Abdelmoumen: 13.000 Ha), et le périmètre des Chtouka (18.300 Ha, irrigués par le barrage Youssef ben Tachfine).

53 C'est ici que l'on trouve les cultures spéculatives de tomate, poivron, agrumes, fraises, fleurs, bananes, etc. qui font la réputation du Souss.

54 Par rapport à la population totale de la zone, la migration extérieure est certainement la plus forte de tout le Maroc. En outre, cette région se signale par la grande diversité dans l'orientation des flux migratoires: au lieu d'une orientation dominante vers la France comme le Souss, c'est vers les Pays-Bas, l'Allemagne et la Belgique que se dirigent la majorité des émigrés.

soixante, le flux migratoire change de caractéristiques: d'une part l'émigration de travail, saisonnière ou temporaire, devient définitive ou pluriannuelle. En somme, la migration extérieure fournit au Rif Oriental les "solutions" que les structures internes ne pouvaient lui assurer. Les paysans pauvres, les ruraux sans terre et les artisans ont été poussés à l'émigration par les difficultés de vivre. L'image de réussite propagée par les premiers partants a vite fait de pousser tout ceux qui le pouvaient à partir. De sorte qu'une fois le mouvement commencé, il a vite atteint des proportions d'une grande ampleur.

Les régions des oasis: troisième grand fournisseur de contingents d'émigrés
Les oasis du Sud et du Sud-Est du Maroc (Tafilalet, Dadès et Drâa, Figuig) constituent des zones agricoles limitées en surface. Leur existence était associée aux ressources en eaux, vitales dans le désert environnant. La pression démographique, la rareté des ressources, le changement des mentalités etc., ont partout entraîné une quête accrue de ressources non-oasiennes, donc extérieures. Une intense émigration, d'abord interne, puis externe s'est instaurée dans les structures mêmes de ces oasis. Les oasis ont développé un des systèmes agricoles traditionnels, pour subvenir aux besoins de leurs fortes concentrations humaines. Elles forment des espaces artificiels au milieu du désert. L'intensité agricole, due à l'irrigation, reflète la multiplicité des arbres et des cultures que l'oasis porte.

La politique marocaine des oasis[55] dont le but était de maîtriser les crues irrégulières des oueds, a contribué fortement à une préservation certaine de ces espaces oasiens comme véritables ressources pour la subsistance, partielle, de leurs populations. Et réduisent, du coup, la pression migratoire potentielle. L'incorporation à une économie capitaliste monétarisée, la croissance démographique très forte et la pression sur les rares ressources hydro-agricoles qui en a résulté, sont quelques uns des facteurs qui vont influencer leur devenir. C'est ainsi que la pauvreté des espaces oasiens (et, surtout, des catégories les plus démunies socialement et ethniquement) apparaissait donc au grand jour. La seule issue à cette crise est apparue dans la recherche d'autres activités en dehors de l'agriculture, principalement grâce à l'émigration. Depuis les années soixante, les migrations internes puis externes sont le fait le plus important à relever.

Toute l'économie est devenue basée sur les remises des migrants. En effet, partout, on a observé un exode vers les villes et vers les chantiers industriels de l'intérieur. Les grandes métropoles et les villes moyennes promues à des fonctions administratives vont attirer les populations oasiennes, principalement du Drâa et du Tafilalet. Dans un second temps, et pour quelques oasis, c'est l'émigration extérieure qui va intervenir, poussant des milliers d'oasiens vers les marchés européens du travail. Cette migration extérieure a surtout affecté les oasis marocaines du Dadess, du Todgha, du Mgoun, du Drâa, et de Figuig. Elle y a atteint un point tel que rares sont les foyers oasiens qui n'ont pas au moins un membre de la famille travaillant à l'étranger qui leur procure des revenus plus ou moins substantiels

Une région récemment touchée par l'émigration: le Tadla
Les régions des plaines et plateaux atlantiques marocain, en dehors des villes, n'ont été jusqu'au début des années soixante-dix que faiblement touchées par l'émigration. Il se trouve que la diffusion du phénomène, intervenue à cette date, a eu lieu dans un moment de fermeture des débouchés traditionnels (France, Belgique, RFA, et Pays Bas).

Le cas de ces régions nouvellement venues est intéressant à analyser, car l'orientation s'y est faite en direction de "nouvelles frontières", principalement l'Italie et l'Espagne. Le Tadla est un bon

55 Deux interventions de grande envergure ont eu lieu: d'une part, l'aménagement de la grande plaine du Tafilalet, et d'autre part, l'aménagement de la vallée du Drâa.

exemple. La région de Fqih Ben Salah fait partie du Tadla, un des fleurons de la politique hydro-agricole marocaine[56].

Dans la problématique migratoire, le cas de cette région est instructif: une politique de modernisation agricole supposée améliorer les conditions d'existence de la population et donc la fixer n'a pas abouti à ces résultats de façon convaincante. Ceci ne traduit pas tant l'échec de cette politique agricole que le fait que les mouvements migratoires sont fort complexes. Pour plusieurs catégories, l'alternative migratoire est le choix principal, à l'image des milliers d'émigrés partis depuis le milieu des années soixante-dix. C'est que les inégalités flagrantes qui découlent des structures de la propriété terrienne sont gravement ressenties[57]. En outre, il y a une part importante de foyers sans terre. Pour ces derniers comme pour les démunis, la migration, d'abord vers la ville, puis ailleurs, est devenue une nécessité.

Plusieurs observations se dégagent de cette étude de la distribution géographique des régions de forte émigration internationale. La première se rapporte aux caractéristiques socio-géographiques et chronologiques des zones de départ, tandis que la seconde se rapporte à leur typologie:

- Les caractéristiques socio-géographiques et chronologiques des zones de départ: A priori, le poids des facteurs de répulsion (push factors) est très fort et rend intelligible cette distribution géographique. Les régions de forte migration correspondent, soit à des zones à forte pression humaine (c'est-à-dire des zones d'ancienne sédentarisation), soit à des zones relativement marginales, souffrant de la sécheresse réelle ou menaçante, et où les ressources ne sont pas parvenues à s'équilibrer avec la demande humaine.

- La typologie des régions de départ selon la précocité ou le caractère récent de l'émigration, on classe les zones des départs en deux grandes catégories: Les régions à profil migratoire conventionnel: il s'agit de celles, généralement rurales, où la migration a démarré assez tôt (par exemple le Souss, le Nord-est, etc.). Ici, la conventionalité apparaît dans l'importance des départs de la population mâle, le caractère individuel du départ à l'origine, suivi par le regroupement familial, le bas niveau et la faible qualification des migrants Les foyers de départ récent se caractérisent par une structure différente de la migration: les émigrés sont le plus souvent alphabètes sinon des scolarisés de haut niveau, partis à travers une filière urbaine (parfois plus ou moins selon un modèle "clandestin"); l'émigré est encore jeune, il part seul, souvent à destination de l'Italie et de l'Espagne.

Une autre étude sur les facteurs d'attraction et de répulsion à l'origine des flux migratoires apporte quelques éléments d'appréciation sur les relations entre le marché du travail et l'émigration à l'échelle régionale[58]. Le choix raisonné effectué a porté sur deux provinces de migration ancienne et trois autres provinces de migrations plus récentes. Les cinq provinces représentent bien les niveaux de développement général avec trois niveaux moyens (Nador, Sattate et Larache) et deux niveaux plutôt faibles (Tiznite et Khnifra)[59].

56 Sur les 200.000 ha qu'elle compte, 28.000 ha environ sont irrigués. L'eau d'irrigation provient de l'Oum er Rbia, un des grands fleuves marocains. La population s'élevait à quelque 130.000 hab. en 1991, dont 70.000 concentrés dans la ville-champignon de Fqih Ben Salah (qui ne comptait que 13.500 habitants en 1960).

57 Dans le périmètre irrigué moderne, 40,7% des propriétés ont moins de deux hectares et concernent seulement 12,3% de la surface totale, tandis que les propriétés de plus de 20 hectares atteignent 1,8% du total, mais couvrent 19,2% des terres.

58 A. Fadloullah, A. Berrada avec la collaboration de M. Khachani: Facteurs d'attraction et de répulsion à l'origine des flux migratoires internationaux. Rapport National. Maroc. Europeans Commission Statistical Office of the European Communities. Rabat, Maroc, novembre 1999.

59 Cette étude a couvert cinq régions économiques sur sept. Ces régions constituent des espaces très hétérogènes au point de vue intensité de l'émigration à l'étranger, d'où la nécessité d'effectuer une typologie spatiale intra régionale afin d'identifier les territoires les plus concernés par le phénomène migratoire. Dans chaque région, c'est la province la plus significative à ce propos qui a été retenue comme terrain de recherche, avec le souci de refléter au mieux, et dans toute la mesure du possible, les diverses catégories d'espaces ruraux et urbains, les différents niveaux économiques, ainsi que les intensités démographiques différentielles et les tendances migratoires récentes ou anciennes, ainsi que les raisons de choix de telle ou telle destination d'accueil.

Les raisons avancées par les ménages pour expliquer l'émigration d'un ou plusieurs de leurs membres sont très disparates. Elles varient sensiblement du milieu urbain au milieu rural et d'une province à l'autre, sachant que les caractéristiques géographiques, sociales, économiques et culturelles diffèrent parfois énormément d'un espace à l'autre. Toutefois, on peut regrouper les raisons principales citées par les personnes interviewées en quatre grandes catégories d'importance inégale d'un milieu à l'autre, mais aussi selon que le migrant soit actuel ou de retour.

Comme il fallait s'y attendre, mais à un degré nettement moindre que prévu, c'est le travail qui émerge comme raison principale d'émigration presque partout prédominante. Il ressort ainsi dans des proportions de 2/5 à 1/2 selon les milieux, à travers les provinces enquêtées, sauf dans les campagnes de la province de Nador où il est cité dans moins de 1/5 des cas (Tableau)

Tableau 5.2. Raisons principales de l'émigration, par province et milieu de résidence (%)

Raisons	Khnifra		Larache		Nador		Sattate		Tiznite	
	urbain	rural	urbain	rural	urbain	rural	urbain	rural	urbain	rural
Travail	55,6	40,9	34,2	43,8	43,1	17,7	65,6	50,8	42,1	47,0
Revenu insuffisant	30,4	36,4	32,5	46,9	25,0	41,2	27,8	40,4	10,6	7,0
Raisons familiales	8,3	18,1	13,2	-	23,6	35,3	1,7	4,0	15,8	28,0
Etudes	2,8	-	13,2	-	8,3	-	4,9	-	26,3	16,0
Autres	2,9	4,6	6,9	9,3	-	5,8	-	4,8	5,2	2,0
Total	100	100	100	100	100	100	100	100	100	100

Le facteur travail semble beaucoup plus déterminant en milieu urbain qu'en milieu rural. Cela traduit l'importance que revêt le phénomène du chômage dans les villes par rapport aux campagnes, dans la mesure où une très grande partie du chômage des secondes se trouve transféré dans les premières par le biais de l'émigration rurale.

On signalera que ce facteur signifie tantôt l'absence d'emploi sur place, tantôt la non disponibilité d'un emploi satisfaisant, tantôt même le désir d'aller travailler en Europe, malgré l'existence d'une occupation plus ou moins adéquate au Maroc. Il est intéressant de souligner que lorsque le travail n'est pas cité en tant que raison principale, il ressort presque toujours en deuxième rang parmi les motivations au départ.

La seconde catégorie de raisons est relative à la recherche d'un meilleur revenu que celui dont dispose le ménage, afin de pouvoir faire face à la cherté continue du coût de la vie et l'augmentation des dépenses, dans les provinces de Nador et de Larache. Cela peut découler tout aussi bien d'un niveau de pauvreté caractérisé (communes de montagne à agriculture médiocre et peu de ressources complémentaires) ou du désir d'améliorer un niveau de vie déjà assez satisfaisant (campagnes riches des secteurs irrigués).

C'est, en effet, en milieu rural que cette faiblesse du revenu familial est le plus évoquée, ce qui traduit bien la situation de pauvreté, voire même d'indigence, que connaissent la plupart des campagnes marocaines souffrant souvent d'inégalités criardes en matière de propriété foncière, de moyens de production et de propriété du cheptel, ainsi que de bas niveaux d'équipements de base et d'infrastructures, déficits qui nourrissent d'importants et continuels flux d'émigration vers les villes et, de plus en plus, vers l'étranger.

Il est tout à fait significatif de noter qu'une proportion non négligeable de ménages a avancé comme raison d'émigrer le souci de vouloir éduquer les enfants. Migrer à l'étranger a été la raison principale évoquée afin de chercher les moyens financiers nécessaires pour cela. D'autres ont mentionné la quête d'une somme d'argent suffisante pour ‘financer’ un mariage. D'autres, peu nombreux, enfin, ont déclaré que l'émigration était la seule issue pour se constituer une épargne et lancer un petit projet.

La troisième place revient à des raisons familiales bien précises, relatives au regroupement familial essentiellement, qu'il soit organisé ou spontané. On n'oubliera pas que ce mécanisme ancien, qui a fonctionné dès les années 60 et qui est devenu, au cours de la décennie 70, un moteur fort puissant de l'émigration, continue à faire passer en Europe d'importants effectifs d'enfants, de conjoints ou de parents des émigrés.

Lorsqu’on examine les raisons principales qui se trouvent à l’origine de l’émigration, des différences peu sensibles apparaissent entre les migrants actuels et les migrants de retour, à travers les espaces étudiés, même si la structure ne change pas beaucoup; car partout ce sont le travail et l’insuffisance du revenu du ménage (lié aussi à la nature du travail) qui s’imposent comme motifs essentiels de l’exil.

Globalement, le travail vient comme raison principale dominante tant pour les migrants actuels que pour les migrants de retour, avec près de la moitié des réponses recueillies. Nous avons donc là une raison structurelle profonde qui a toujours été, qui demeure et qui restera, sans doute, capitale, à l'avenir, vu la crise économique persistante et les perspectives démographiques qui déterminent, pour longtemps encore, une structure d'âge jeune amenant des cohortes considérables sur un marché de l'emploi local et national très peu performant et souvent saturé, quantitativement et qualitativement parlant.

L'insuffisance du revenu familial vient en seconde position pour les deux catégories de migrants, avec pratiquement la même proportion, soit un migrant sur trois. Les raisons liées aux études (financer l'instruction des enfants au Maroc ou le départ de ceux-ci pour étudier à l'étranger) paraissent d'importance égale pour les deux catégories. Seules les raisons ayant trait directement ou indirectement au regroupement familial, laissent apparaître un poids plus grand pour les migrants actuels (15%) que pour les migrants récents (10%)

Au total, tout se passe comme si la structure d'ensemble des raisons de départ n'a pas subi de très grands changements, puisque, dans le fond, le chômage et la pauvreté demeurent les incitations essentielles à l'émigration pour la plupart des individus. En fait, des différences plus marquées sont enregistrées entre hommes et femmes. Les premiers qui montrent une structure rapprochée, entre migrant actuel et migrant de retour, et pour lesquels le travail s'inscrit partout comme raison principale, suivie par le souci d'améliorer le revenu familial, se distinguent des secondes pour lesquelles le regroupement familial a joué dans plus de quatre cas sur cinq.

Toutefois, on ne manquera pas de noter que la recherche du travail a causé la migration de 1/7 des jeunes filles et des femmes, ce qui est le signe éloquent que le chômage féminin, de plus en plus massif parmi les analphabètes, les peu instruites et les diplômées, commence à jouer de plus en plus comme moteur de l'émigration féminine, alors que celle-ci était exclusivement le sous-produit de l'émigration masculine. La femme n'est plus exclusivement une migrante accompagnant son mari ou sa famille, mais tend à devenir elle–même un acteur de la migration récente notamment.

Le manque de travail ou l’existence d’un emploi non satisfaisant sont, bien sûr, les facteurs principaux de l’émigration. Si, au plan global, cela constitue près de la moitié des cas, des différences importantes existent entre les provinces (voir tableau). La quête de revenus meilleurs est la raison qui aurait poussé près d’un migrant actuel sur trois à s’expatrier. Les raisons à caractère familial concernent environ 15% des migrants.

Impact sur le travail qualifié

La fuite des cerveaux qui caractérise depuis 1995, avec l’avènement d’Internet, le secteur des NTI (Nouvelles technologies de l’information) au Maroc a atteint durant l’année en cours des proportions qualifiées d'inquiétantes par les entreprises dudit secteur. Les besoins en ingénieurs informaticiens et télécoms des pays du Nord pour faire face à l'essor de la net économie, les poussent à puiser dans les ressources - déjà rares - des pays du Sud.

Le phénomène n'est pas propre au Maroc, puisque la plupart des pays en développement où le secteur des NTI constitue une opportunité quasi unique d'émergence de leur économie, y sont également confrontés mais à des degrés divers. A titre de comparaison, l'Inde produisant ce type d'ingénieurs par milliers ne devrait pas s'en alarmer outre mesure. Contrairement à un pays comme le Maroc, dont les effectifs annuels en la matière ne dépassent pas la moyenne de 250 ingénieurs ! Les perspectives sont d'autant plus graves que les dernières statistiques situent les besoins de l'Union européenne, destination de prédilection de ces migrations pour des raisons essentiellement culturelles, à 1,2 millions d'ingénieurs pour les deux prochaines années. Mais l'attrait des Etats-Unis et du Canada ne doit pas non plus être ignoré.

Les raisons des départs sont nombreuses et ne sont pas motivées, contrairement à ce que beaucoup peuvent croire, par les seules considérations salariales. Elles peuvent être résumées en une pyramide à trois niveaux. A la base de cette pyramide, se pose d'abord le problème du salaire de base dans son rapport aux attributs du statut social des ingénieurs en question (couverture médicale, logement digne de cette élite, moyen de transport adéquat, etc.). Vient ensuite, au deuxième niveau de la pyramide, l'environnement au sens large où ils sont appelés à évoluer: désintérêt pour la chose publique, désaffection du politique, éducation et autres loisirs. Les perspectives d'évolution professionnelle arrivent au troisième étage de la pyramide des motivations de l'expatriation.

L'émigration permanente des travailleurs qualifiés d'un pays en développement peut porter préjudice aux perspectives de croissance de ce pays. En revanche, les migrations temporaires pourraient favoriser la diffusion du savoir et les transferts de fonds en leur faveur, deux vecteurs à même d'alimenter leur prospérité.

C'est bien la migration permanente des travailleurs qualifiés des pays pauvres vers les pays riches qui pose problème. Celle-ci prive les pays pauvres de compétences indispensables à leur croissance et alimente la pression migratoire aux portes des pays riches. En revanche, une circulation orchestrée des travailleurs qualifiés pourrait induire des gains mutuels.

La circulation des élites permettrait aux travailleurs des pays pauvres d'acquérir des compétences additionnelles en travaillant dans des pays plus développés. Or, ces connaissances seraient à terme utilisées et diffusées par les migrants à leur retour. La migration temporaire des travailleurs qualifiés favorise donc l'accumulation et la diffusion du savoir dans les pays en développement.

La circulation des élites permet également à ces travailleurs de bénéficier de revenus plus élevés. Or, d'un côté, ces revenus font l'objet de transferts directs plus importants vers leur contrée natale. Nous avons en effet signalé que les migrants temporaires transfèrent une plus forte part de leur revenu que les migrants permanents. De plus, certains travaux montrent que les migrants temporaires ont une plus forte propension à l'emploi et à l'épargne (Dustmann 1996 et 1997). D'un autre côté, ces travailleurs sont incités à investir, à leur retour dans leur pays natal, l'épargne qu'ils ont accumulée à l'étranger. La migration temporaire des travailleurs qualifiés favorise donc la réduction de la pauvreté et l'accumulation du capital dans les pays en développement.

La circulation migratoire ne peut toutefois être opérationnelle que sous deux conditions. Les pays d'accueil doivent d'abord transcrire cette volonté dans leur politique migratoire. En clair, les titres de séjours et les permis de travail octroyés aux spécialistes étrangers devraient être essentiellement temporaires. De plus, l'immigration temporaire ne doit pas être une voie d'accès quasi certaine à un statut de résident permanent pour ces ressortissants.

Impact sur les conditions de vie des ménages marocains

Au-delà des apports en devises et du financement des investissements, les transferts contribuent, pour une bonne part, directement ou indirectement, à l'amélioration du niveau de vie des familles et à la réduction de la pauvreté. Se référant à des données récentes de l'enquête nationale sur les niveaux de vie des ménages, qui a consacré un volet important aux transferts courants reçus directement par les ménages, une étude récente s'est proposée d'évaluer l'impact des transferts effectués par les Marocains résidant à l'étranger en termes de soutien aux ménages les plus dé favorisés et de réduction de la pauvreté.

D'après l'étude réalisée par Mr Bourchachen les transferts seraient à l'origine d'une baisse du taux de pauvreté au Maroc de 23,2% à 19%; autrement dit, 1,2 millions de Marocains auraient échappés à la pauvreté grâce au soutien financier des émigrés opéré sous forme d'investissements et de divers transferts[60]. Tel qu'observé par l'enquête nationale sur le niveau de vie des ménages (ENNVM), le montant global de ces transferts s'élève à plus de 5 milliards de dirhams[61]. Les transferts en espèce ou en nature jouent un rôle important dans le soutien aux ménages marocains, notamment ceux défavorisés. Ces compléments de revenus proviennent de deux sources: d'une part, les réseaux de solidarité familiale au sens large (ménages) et, d'autre part, diverses institutions dont tout particulièrement l'administration, les établissements privés et les organisations non gouvernementales.

Les personnes épargnées de la pauvreté appartiennent pratiquement à toutes les couches de la société marocaine. On remarquera à cet égard qu'en l'absence des transferts, plus de 400.000 personnes classées parmi les couches aisées (déciles 8, 9 et 10) auraient fait partie de la population pauvre, c'est dire la contribution essentielle de ces ressources aux revenus des ménages et à l'amélioration, relativement substantielle, de leur niveau de vie. L'apport de l'émigration en tant que source de revenus pour l'économie marocaine est manifestement fondamental. L'importance de ces transferts réside tout particulièrement dans leur caractère de filets de protection sociale contre les divers dénuements auxquels les familles marocaines sont confrontées.

Quoiqu'ils bénéficient à concurrence de 70% aux couches sociales les plus aisées (déciles 8, 9 et 10), ces transferts ne manquent pas d'avoir des répercussions favorables sur les couches les moins loties. Globalement, ils sont à l'origine d'une baisse du taux de pauvreté de 20,4% à 19,0% au niveau national. A l'exception des 10% les plus défavorisées et des 10% les plus riches, toutes les catégories de la population ont bénéficié de façon plus ou moins significative de l'apport de ces transferts[62].

Les ONGs impliquant les migrants marocains peuvent constituer un appui notable pour la création et l'organisation d'associations villageoises. Ces ONG accompagnent depuis 15 ans des

60 Etant donné que les transferts courants aux ménages ne représentent en réalité qu'une partie des transferts inscrits dans la balance des paiements, et sachant que ces derniers profitent, à terme, aux ménages sous forme de créations d'emplois et de distributions de salaires, il a été procédé à une seconde évaluation, plus complète, de l'apport des transferts.

61 La prise en considération de la différence entre la valeur des transferts courants aux ménages et celle des transferts dégagés par les comptes nationaux nécessitait de redresser les montants observés par l'ENNVM. Pour cela, un coefficient de redressement a été choisi, à savoir le rapport de la valeur des envois dé rivés des comptes nationaux à celle des transferts courants aux ménages.

62 Selon Bourchahcen, ce volume de la population épargnée de la pauvreté ne constitue qu'une estimation minimale, dans la mesure où les transferts courants directs aux ménages ne représentent qu'une partie des transferts tels que dérivés de la comptabilité nationale. En effet, la comparaison du montant des transferts observés par l'ENNVM (transferts courants aux ménages) et celui livré par la balance des paiements dégage une nette différence de quelques 14 milliards de dirhams. Les MRE ont ainsi rapatrié plus de 19 milliards de dirhams, soit près de quatre fois le montant reçu directement par les ménages et destiné à la consommation courante.

actions de développement dans les régions du Maroc dont les migrants sont originaires. Dans le sud du Maroc, certaines associations de migrants ont joué un rôle important dans l'impulsion de la création d'associations villageoises. Ainsi, depuis une vingtaine d'années, le rythme de création des associations avec l'appui d'association de migrants est d'environ 200 associations (soit en moyenne une quinzaine par an). La relation permanente que ces associations entretiennent avec les migrants dans différentes régions en Europe a eu un rôle déterminant dans la réussite des projets[63].

Tableau 5.3. Transferts corrigés par habitant et par classe de déciles de la dépense moyenne

Décile	Ménages concernés	Transferts par habitant: en Dirham	Transferts redressés par habitant (en Dirham)
10	15 076	13	50
20	19 527	12	44
30	34 145	71	271
40	37 470	76	289
50	49 887	109	413
60	49 353	143	543
70	64 755	121	461
80	86 484	228	865
90	111 317	370	1 405
100	148 241	662	2 512
Ensemble	**616 255**	**181**	**685**

Impact des transferts sur le marché du travail
Les transferts financiers effectués par les marocains résidents à l'étranger (MRE) représentent un enjeu important pour l'économie marocaine non seulement en tant que soutien au revenu des ménages mais aussi et surtout en tant qu'apport supplémentaire en épargne et en tant que ressource essentielle en devises. Les évaluations actuelles situent le montant global de ces transferts par les circuits officiels à quelque 37 Milliards de dirhams. Ce montant qui représente ainsi plus de 8% du PIB correspond à près de 40% de la valeur des exportations et se situe à hauteur de 80% du déficit commercial.

Au plan du volume global des transferts de l'émigration à l'échelon international qui, selon les estimations les plus récentes, atteignent 88 milliards de dollars environ, le Maroc se positionne comme le quatrième pays bénéficiaire de ces transferts après l'Inde, le Mexique et les Philippines. La prise en compte de la taille de la population émigrée replace le Maroc au deuxième rang des pays bénéficiant des flux financiers en provenance de l'émigration après le Liban. Recentrées sur la zone Maghreb, cette comparaison situe le Maroc comme le premier pays de la région avec un montant global des transferts représentant plus de 9% du PIB contre 4,6% pour la Tunisie et à peine 2,5% pour l'Algérie.

En effet, la propension à épargner demeure très forte chez les émigrés marocains. Selon une enquête réalisée par l'Institut National de la Statistique et d'Economie Appliquée1, 94% d'entre eux ont transféré des fonds au Maroc durant les cinq années couvertes par l'enquête, et près de 60% ont affirmé avoir transféré au moins un quart de leurs revenus annuels. L'importance des fonds transférés tient non seulement à l'évolution des effectifs de la population concernée mais aussi aux multiples liens que cette population entretient avec son pays d'origine

63 Par ailleurs, les migrants participent d'une manière active au développement de certaines régions par leur contribution à des projets de développement local. L'expérience menée au Maroc par l'ONG française « Migrations et Développement » (M&D) et une autre ONG marocaine du même nom (et qui a servi d'écran à la première jusqu'en 1998 avant de devenir autonome) présente un intérêt particulier.

Les transferts financiers de l'émigration marocaine ont connu des progressions importantes au cours des deux dernières décennies en dépit des restrictions de plus en plus fortes imposées par la politique migratoires des principales régions de destination.

Les données de l'année 2007 situent le montant global des transferts à quelque 55 milliards de dirhams contre 23 milliards en 2000, ce qui équivaut à un rythme de hausse dépassant 15,2% en moyen par an. Ce résultant fort appréciable s'explique autant par la progression des effectifs des populations émigrés que par leur répartition selon les pays et/ou les régions d'accueil, les catégories socio-professionnelles qui les composent, leur niveau d'activité, la nature des emplois qu'ils occupent et leur ancienneté dans les pays d'accueil.

Entre 1970 et 2007, la valeur nominale des transferts officiels a été multiplié par près de 125, passant de 317 millions à 55.000 millions de dirhams[64]. Ces transferts de fonds ont été stimulés par une série de facteurs, notamment les dévaluations successives du dirham, les taux d'inflation bas, et l'installation, à partir de 1971, des réseaux bancaires dans les pays d'accueil. Mais deux autres facteurs ont agi en sens inverse: la tendance à l'installation définitive des nouvelles générations dans les pays d'accueil, et la concurrence livrée par les banques de ces pays aux banques marocaines pour proposer aux immigrés des produits plus intéressants. En dépit d'une tendance à un tassement durant les années 90, les transferts continuent de constituer des ressources appréciables pour le Maroc, ils dépassent largement les flux d'investissements directs étrangers qui ont représenté en moyenne annuelle quelques 500 millions de $ durant la dernière décennie.

Enjeu essentiel de la problématique migratoire, les transferts des fonds constituent une ressource appréciable pour les équilibres macro-économiques et la dynamique de la croissance de l'économie marocaine. L'importance de ces transferts pour l'économie marocaine peut être mieux appréciée en comparant ces fonds à certains agrégats macro-économiques.

L'impact des transferts sur le marché du travail est indéniable. S'il est difficile de la quantifier directement, on peut l'apprécier par des indicateurs indirects. Ces indicateurs d'ordre macroéconomique font référence à la contribution des transferts à la richesse produite, à l'épargne nationale et à l'investissement.

De par leur utilisation, les fonds transférés peuvent avoir plusieurs utilisations: assurer les besoins de consommation et les dépenses courantes des membres de la famille des migrants qui sont restés dans le pays d'origine ou des migrants eux-mêmes, lors de leur séjour dans le pays, comme ils peuvent alimenter le stock d'épargne. Celui-ci servira à son tour à couvrir une partie des besoins en investissements productifs des MRE ou d'autres investisseurs au Maroc, comme il peut être utilisé pour l'acquisition de valeurs mobilières ou de biens immobiliers.

L'importance des transferts pour l'économie marocaine peut être mieux appréciée en comparant ces fonds à certains agrégats macro-économiques:

- Ils participent à la formation de l'Epargne Nationale
- Ils représentent plus de 30% du montant de la formation brute du capital fixe
- Ils alimentent sensiblement la circulation de la monnaie scripturale (entre 17 et 20%)
- Ils dépassent largement l'ensemble des investissements et prêts privés étrangers au Maroc. Les fluctuations en dents de scie des investissements étrangers contrastent avec l'évolution soutenue des transferts de fonds.

Représentant l'essentiel des revenus reçus du reste du monde, les transferts des marocains résidant à l'étranger contribuent pour une part significative à la formation à la fois du revenu national, de l'épargne et de l'investissement. Ils ont atteint 8,6% du PIB et ont constitué un apport de l'ordre de

64 L'euro équivaut à environ 11,1 dirhams.

8% dans la structure du revenu national. L'impact de ces transferts se fait ressentir au niveau de l'activité économique intérieure à travers la consommation, l'épargne et l'investissement.

Sachant qu'une bonne partie des flux financiers de l'émigration constituent des revenus destinés au soutien aux membres des familles des émigrés restés au pays, la première affectation à considérer pour ces flux est la consommation. En l'absence de données précises à ce sujet, la consommation générée par les transferts des marocains résidant à l'étranger peut être approchée sur la base des paramètres de la propension moyenne à consommer qui ressortent des agrégats correspondant dans les comptes nationaux. L'application de ces paramètres permet de situer le volume de consommation générée par les flux financiers de l'émigration autour de 21 milliards de dirhams en 2004, ce qui équivaut à pus de la moitié de la valeur globale des transferts et à près de 8% des dépenses de consommation des ménages résidents.

Pour mesurer l'importance d'un tel apport à l'activité économique et à la demande, on relèvera que, d'après les résultats de la dernière enquête sur les dépenses des ménages, ce pourcentage dépasse sensiblement la part qui revient à 20% des ménages les plus défavorisés dans la consommation totale. L'apport financier de l'émigration assure ainsi les moyens de subsistance à une part non négligeable de la population. La structure des dépenses de consommation pour les populations bénéficiaires considérée selon les groupes de produits aura, quant à elle connu au cours des dernières années des changements assez importants en liaison avec l'accroissement des revenus transférés. Ces dépenses ont de plus en plus tendance à s'orienter vers les rubriques de consommation correspondant au logement, aux transports et aux autres services.

Tableau 5.4. Proportion des transferts des RME par rapport à des agrégats macroéconomique

	Transferts	*%Epargne*	*%Investissement*	*%Monnaie Scripturale*	*%IDE*
1990	16538	31.34	32.41	27.06	883.44
1991	17328	33.16	32.17	24.96	530.07
1992	18531	34.54	34.09	24.93	431.15
1993	18216	34.96	32.12	23.28	331.92
1994	16814	31.27	29.24	19.29	329.36
1995	16820	34.54	27.85	18.14	397.54
1996	18874	30.03	30.47	22.38	430.23
1997	18033	27.71	27.41	19.56	146.17
1998	19200	25.34	25.05	19.27	353.40
1999	19002	23.67	22.76	17.15	102.94
2000	22962	29.10	26.88	18.65	181.66
2001	36858	34.79	43.17	25.58	110.82
2002	31708	29.75	34.79	19.88	609.07
2003	34582	29.73	34.41	19.62	148.70
2004	37346	31.21	34.24	19.05	393.74
2005	39538	30.47	34.16	17.40	152.00
2006	47834	32,3	35,1	18,2	159,7
2007	55000	33,4	36,3	19,1	115,6

Plus importante encore est l'utilisation de cette épargne et sa transformation en investissement. D'abord d'un point de vue globale, pour un volume d'investissement de 109 milliards de dirhams en 2004, l'équilibre du compte capital de la nation montre que l'épargne réalisée sur les flux financiers de l'émigration aura contribué au financement de la formation brute de capital fixe à hauteur de 16% Ce résultat qui révèle tout l'intérêt que portent les migrants à l'investissement dans leur pays d'origine est corroboré par les données sur le comportement d'investissement des ressortissants marocains à l'étranger à travers l'enquête publiée par l'INSEA (2000).

Selon cette enquête, plus de 70% des émigrés enquêtés déclarent avoir effectué au moins une opération d'investissement au Maroc contre seulement 20% dans le pays d'accueil. Derrière cette donnée se profilent deux constats importants: d'une part la fréquence des opérations d'investissement au Maroc marque l'attachement toujours vivace de la population émigrée au pays d'origine et, d'autre part, la transformation progressive de l'émigration temporaire en émigration permanente. L'examen de la nature des investissements réalisés et leur structure selon les secteurs d'activité apportent des éléments encore plus significatifs à ce sujet.

Les investissements réalisés par la population émigrée que ce soit au Maroc ou dans les pays d'accueil ont connu une progression assez marquée au cours de ces trente dernières années. La décennie quatre-vingt-dix a même enregistré une plus grande fréquence des investissements avec la réalisation de près de 60% de l'ensemble des projets contre à peine 30% pour la décennie précédente. Considérée selon les secteurs d'activité, l'investissement des marocains résidant à l'étranger est orienté en priorité vers l'immobilier et concerne plus spécifiquement l'acquisition ou la construction d'un logement. Symbole de réussite ou facteur de sécurité et de stabilité dans la perspective toujours présente du retour au pays, l'investissement dans l'immobilier ressort comme l'affectation prépondérante de l'épargne des émigrés dans toutes les études menées à ce sujet.

Au vu de ce qui précède, il est clair que les migrants peuvent participer d'une manière active au développement de leur pays d'origine. L'impératif d'une croissance forte et durable requiert la mobilisation à des fins productives de toutes les potentialités et ressources financières externes qu'ils offrent. Une nouvelle approche des incidences de l'émigration sur l'économie du Maroc et des régions de départ des migrants est nécessaire. Mais cela suppose que les diverses institutions concernées révisent leur perception du rôle, actuel et potentiel, du migrant, et considère celui-ci comme un acteur du développement dans sa région d'origine.

Lien entre migration et l'informel

La relation entre l'émigration et l'informel est difficile à établir. Deux approches peuvent aider à saisir le line entre ces deux phénomènes:

- la connaissance de l'itinéraire de travail des émigrés avant leur décision de de quitter le territoire national à la recherche d'un travail à l'étranger. Cette connaissance permettrait de savoir si ces émigré exerçaient en situation d'emploi, et dans quelle type d'activité étaient-il insérés: formelle ou informelle
- l'effet de l'émigration sur le développement du secteur informel dans les bassins d'émigration des pays d'origine.

Ces deux approches exigent la réalisation d'enquêtes de terrain sur lesquelles peuvent être bâties des analyses approfondies. Aucune étude n'a été initiée dans cette problématique au Maroc. Aussi, le lien entre l'émigration et le secteur informe ne peut être appréhendée que par quelques observations générales sur le secteur informel.

L'enquête sur le niveau de vie des ménages est un moyen d'obtenir des informations sur un univers représentatif de l'ensemble des unités informelles. Celles de 1991 et de 1999 ont relevé des données spécifiques sur les actifs des ménages de l'échantillon qui ont déclaré une activité indépendante. La notion d'indépendant est très large, puisqu'elle inclut aussi bien les personnes travaillant pour leur compte, seules, ou avec une main d'œuvre non salariée (apprentis, aides familiales), que les employeurs faisant travailler des salariés. Par conséquent, une partie des entrepreneurs individuels n'exerce pas dans le secteur non structuré. Mais l'utilisation du critère de l'absence de tenue de la comptabilité a permis de distinguer entre les secteurs non structuré et moderne. En outre, à partir de la description de l'activité, et du lieu où elle s'exerce, des catégories du secteur informel, telles que les ambulants, et les activités s'exerçant à domicile ont pu être saisis.

Il ressort de ces enquêtes que l'emploi indépendant concernait une population d'environ entre 50 et 60% des personnes actives occupées. La structure de cet emploi indépendant fait ressortir la prédominance incontestée de l'emploi ambulant, avec plus de la moitié de l'effectif global dans les deux enquêtes. Le reste est réparti entre les entreprises informelles, et les travailleurs à domicile. On peut rapprocher ces données de celles émanant d'autres enquêtes parcellaires portant sur l'activité des travailleurs émigrés avant leur insertion dans les pays d'accueil. Il ressort de ces enquêtes que la grande majorité de ces émigrés étaient soient en chômage ou exerçaient un travail agricole en milieu rural ou des activités ambulantes dans les milieux rural et urbain.

En ce qui concerne les revenus, les activités indépendantes informelles ont réalisé durant l'année 1991, un chiffre d'affaires de l'ordre de 20 milliards de dirhams en termes courants, dégageant une valeur ajoutée de 13,9 milliards, soit 6% du PIB. Durant la même année, les activités indépendantes ont pu assurer un emploi permanent à quelques 69000 personnes, soit 7% de l'emploi indépendant global, dépensant une masse salariale d'environ 213 millions de dirhams. La plupart de ces personnes n'avaient jamais fréquenté l'école ou ne sont allés qu'à l'école coranique et la majorité d'entre eux ont commencé précocement leur carrière professionnelle par une expérience d'apprentis comme dans les activités artisanales ou de simples ouvriers comme dans le secteur de la construction.

De plus, les données sur le marché de travail des bassins d'émigration font ressortir des caractéristiques et tendances marquées pour le travail informel: une « dynamique » d'emplois précaires, un faible niveau d'éducation et de formation des actifs, alimenté de plus en plus par des non scolarisés ou des déscolarisés. L'instabilité de la main d'oeuvre semble constituer un trait majeur dans ces régions. C'est essentiellement les mauvaises conditions de travail et le faible niveau des salaires qui expliquent la décision de l'émigration.

D'un autre côté, un aspect de la relation marché du travail dans les pays d'origine et l'émigration mériterait d'être exploré. Il s'agit du développement amplifié des activités informelles dans les bassins d'émigration. Cette tendance est manifeste dans beaucoup de régions du Maroc. Les activités du secteur informel sont alimentées par les transferts en nature (marchandises, biens d'équipement…) résultant des déplacements réguliers des travailleurs émigrés. Diverses places de commerce informel portent le nom de villes italiennes, belges ou françaises d'accueil des travailleurs émigrés marocains. Ces « importations » de marchandises sont tolérées par les pouvoirs publics, elles représentent une source de revenu additionnel aux résidents marocains à l'étranger, animent une activité régulière dans les régions d'origine des émigrés.

Migration et femmes

Les femmes marocaines ont commencé à immigrer vers les pays d'Europe dans les années 1970, d'abord, dans le cadre du regroupement familial pour rejoindre et vivre avec leurs conjoints qui ont immigré, de façon isolée, à la recherche d'un travail et d'une source de subsistance. Ensuite, et à leur tour, elles ont immigré seules, entre 20 et 40 ans, toujours dans la même perspective, fuir les problèmes de chômage et retrouver du travail, vivre leurs propres vies en toute indépendance, considérant l'immigration comme une ouverture vers un avenir de plus grande liberté, une meilleure qualité de vie, une meilleure évolution professionnelle et une plus grande indépendance.

Petit à petit à partir des années 90, on a assisté à un processus de féminisation des flux migratoires. ElleS représentent actuellement près de 35% de l'ensemble de la communauté marocaine à l'étranger. Depuis, la féminisation de la migration est devenue un phénomène important qu'il importe de prendre en considération, à cause des répercussions sociales qu'elle a engendrées et en raison des changements des modes de vie qu'elle a imposé dans la vie de famille. Actuellement, les femmes n'hésitent plus et même ne rencontrent plus de difficultés à immigrer. Avec ou sans famille, de façon irrégulière ou irrégulière, elles immigrent et assument leurs conditions d'immigrantes.

Il existe trois catégories de femmes marocaines migrantes:

- La première catégorie concerne les femmes qui ont immigré dans le cadre du regroupement familial.Celles-ci ont rejoint leurs maris et se contentent en général d'élever les enfants et d'entretenir le foyer en s'occupant des affaires familiales et en veillant scrupuleusement au respect des traditions familiales et des coutumes du pays d'origine.

- La deuxième catégorie regroupe les femmes seules qui ont immigré en leurs qualités d'entités économiques autonomes, de leur propre gré, à la recherche d'un emploi, pour poursuivre leurs études ou tout simplement pour échapper à l'emprise des contraintes de la société ou des problèmes sociaux. Leur départ correspond toujours à un désir d'émancipation par la migration.

- La troisième catégorie réunit les femmes nées en Europe, dans les pays d'accueil, celles de la seconde génération. Souvent binationales, ces femmes ont toujours vécu dans les pays d'accueil en adoptant leurs habitudes et leurs mœurs. La culture des parents va se trouver alors en interaction et parfois en confrontation avec celle de la société d'immigration. Pères et mères vont s'efforcer d'imposer et de défendre une partie des valeurs culturelles traditionnelles, tenter de les négocier autant que faire se peut, avec la société d'immigration.

Malgré les évolutions de ces dernières années, la situation des femmes marocaines de l'immigration souffre d'un manque de visibilité. Cette invisibilité des femmes dans l'immigration est aussi marquante dans le domaine des études et plus particulièrement des statistiques. C'est pourquoi tant la nature que l'ampleur de ce sujet sont longtemps restés méconnus. Les femmes de l'immigration, par la double discrimination qu'elles subissent à raison de leur origine et de leur sexe, témoignent également de la difficile question de l'égalité entre les hommes et les femmes.

La situation des femmes immigrées et issues de l'immigration est marquée par une grande fragilité, tant du point de vue juridique qu'économique: discrimination à l'embauche, sous-représentations dans les instances au niveau des postes de décision, dans la haute fonction publique, victimes de la paupérisation et de la précarité…

Au plan professionnel, elles subissent une double discrimination: femmes et immigrée, qui les confine au pire dans les travaux de pure main-d'œuvre (femmes de ménage, ouvrières) et au mieux dans la création d'activités ou d'entreprises avec pour premier objectif la création d'emplois qui leur sont refusés ailleurs. Il en résulte un taux de chômage exponentiel.

Plus précisément, les femmes immigrées occupent plus souvent des emplois de service aux particuliers que l'ensemble des actives; c'est le cas pour une femme immigrée sur cinq, mais pour une active sur dix seulement. De manière générale, en Europe, les femmes subissent davantage que les hommes les difficultés d'accès à l'emploi. Les femmes marocaines immigrées, comme les autres, sont plus touchées par le chômage que les hommes. D'une manière générale, les femmes immigrées sont plus jeunes que les hommes immigrés mais leur niveau d'instruction est généralement assez bas et beaucoup d'entre elles sont sans qualification aucune, surtout celles ayant émigré dans le cadre du regroupement familial. Les plus instruites sont des jeunes issues de la deuxième génération, celles appartenant à la vague récente d'immigration ou celles, très peu nombreuses, qui ont poursuivi des études souvent supérieures et préféré rester dans le pays d'accueil. Ce niveau d'instruction se répercute sur la qualité et la nature de l'emploi féminin.

Migration et jeunes

Le stock de chômage des jeunes, notamment des jeunes diplômés, la pression qui s'exerce sur le marché du travail national par les nouveaux arrivants, la faible intensité de la croissance en emplois sont des facteurs qui accentuent la recherche du travail à l'étranger. Les enquêtes d'opinion réalisées au cours de diverses études sur le phénomène migratoire marocain, et plus particulièrement des jeunes, relèvent la très nette propension de ces derniers à désirer migrer. L'enquête sur l'attractivité précédemment citée apporte aussi quelques éléments d'appréciation sur le désir d'émigrer qui traverse de larges franches de la jeunesse marocaine. Selon le sexe du postulant, on note que les départs sont envisagés à tous les âges et plus particulièrement à 20-29 ans où les proportions dépassent 30% pour les personnes relevant des ménages non-migrants. Au niveau des ménages migrants de retour, les proportions sont élevées à partir de 25 ans. Au-delà de 50 ans les candidats à l'émigration ne se manifestent pratiquement plus.

Tableau 5.5. Personnes projetant de migrer à l'étranger selon l'âge (%)

Groupes d'âges	Non-migrants		Migrant de retour	
	oui	ne sait pas	oui	ne sait pas
<20 ans	22	18	-	-
20–24	31	14	-	-
25–29	33	17	61	6
30–34	27	12	43	14
35–39	21	15	50	8
40–44	24	8	57	-
45–49	13	11	56	13
50 et +	3	8	-	-
Total	20	12	27	5

Les projets migratoires formulés par les jeunes Marocains s'inscrivent dans un contexte particulier: celui du phénomène migratoire au sein de la société marocaine. La migration est un fait doté d'une antériorité historique et sujette à de nombreuses mutations. Ce phénomène a été le lieu d'un processus continu d'extension régionale et sociale. Le résultat est sa transformation en un fait marqué par l'évidence sociale. Ce caractère évident n'inclut pas nécessairement une perception homogène de l'acte migratoire, le traitement varie avec le statut social juridique et administratif des individus inscrit à des degrés divers au sein d'un processus migratoire. Les interactions sociales des migrants potentiels sont toutes aussi centrales pour saisir la nature de ces projets. Ils sont notamment, un moyen pour certains, d'accéder au marché du travail et à la responsabilité sociale.

Migration temporaire

Du point de vue des pouvoirs publics, "La migration temporaire de travailleurs peut constituer une solution pour traiter la problématique d'excédent ou de pénurie dans les offres d'emploi, selon les pays", cette solution pourrait "assurer ainsi l'accès légal à un marché du travail variable qui protège les droits fondamentaux des immigrés, notamment les femmes

Selon ce même point de vue[65], la migration temporaire de travailleurs constitue une opportunité de développement et d'accords bilatéraux entre pays émetteurs d'émigrés et pays récepteurs. En l'absence d'un système professionnel multilatéral, les accords bilatéraux peuvent fonctionner efficacement et assurer le développement de la migration temporaire dans certains pays. La vision du Maroc concernant la migration temporaire serait fondée sur une approche globale marquée par « une analyse innovatrice dans la manière de traiter cette problématique migratoire et une volonté d'agir de façon collective, résolue et durable ».

65 Exprimé par Mr Amrani, Secrétaire Général du Ministère des Affaires Etrangères lors du Forum de l'OCDE

Le Département des Affaires étrangères considère que la coopération entre le Maroc et l'Espagne en matière d'accès légal au marché de l'emploi, comme expérience pionnière. Plusieurs accords bilatéraux ont été conclus et mis en œuvre: échange d'informations sur la demande et l'offre en poste d'emploi, informations de travailleurs sur les opportunités d'immigration légale, sélection conjointe de travailleurs et développement du dialogue. Ces accords, "peuvent également garantir le retour des immigrés et leur réintégration, consolidant ainsi le climat de confiance entre les pays pour coopérer dans d'autres domaines

Un projet de manuel est en cours d'élaboration afin de préparer un document analytique sur les bonnes pratiques et les expériences acquises en matière de travail saisonnier.

Vu sous un autre angle, 'Espagne aspire la main d'œuvre marocaine, la privant ainsi de son avantage concurrentiel dans le secteur agricole: le faible coût de son facteur travail. Les exploitants agricoles ont de plus en plus de mal à trouver des travailleurs marocains parce que l'immigration est devenue une promotion sociale au Maroc, contrairement aux années 60 et 70. ». L'accord signé entre l'Espagne et le Maroc prévoit en principe d'offrir un contrat définitif au bout de la quatrième année consécutive à l'ouvrière agricole.

Selon les observations recueillies sur les conditions de travail de ces femmes, le travail temporaire s'apparente à un régime d'exploitation qui ne dit pas son nom. Le système de « contratación en origen » (recrutement à l'étranger) fonctionne depuis 2001 en Espagne et permet d'importer le temps que dure la récolte, les bras les moins chers du marché international de main d'oeuvre: à Huelva, en 2006, près de, 33.000 travailleurs sont venus en autobus de Roumanie, d'Ukraine, de Pologne et du Maroc.

Ce système donne donc lieu à une sélection de travailleurs étrangers, en tentant de concilier l'inconciliable: fournir une main d'œuvre bon marché, tout en s'assurant de son retour au pays à la fin du contrat, formule qui a déjà fait florès dans l'histoire de l'immigration avec les conséquences que l'on sait.

On sélectionne donc des femmes, parce qu'elles « *génèrent moins de conflits, elles ont les mains plus délicates, elles sont plus travailleuses, et plus humbles*»; ayant une expérience dans l'agriculture; pas trop maigres, et pas trop grosses; pas trop jeunes, pas trop fêtardes et ayant dans le pays d'origine des charges familiales, enfants en bas âge, afin de s'assurer de leur retour une fois la saison terminée[66].

On peut aussi constater dans les discours des recruteurs, une nette préférence pour les roumaines et les polonaises par rapport aux marocaines « *qui n'ont pas la même culture, la même religion et ne savent pas parler espagnol. Le problème des travailleuses marocaines, c'est que quand je dois les répartir aux agriculteurs, ils n'en veulent pas. Des 350 de cette année, il m'en reste 50 sur les bras… et je dois encore placer toutes les sénégalaises* ».

Ce « service intégral de recrutement » permet d'éviter les mouvements désordonnés de l'immigration clandestine et ses corollaires: insuffisance des infrastructures locales, logements, services sanitaires, et développement du racisme et de la xénophobie… Ainsi, faire son marché aux travailleurs dans les pays pauvres qui ceinturent la zone de « développement » européen.

Dans la pratique, les travailleuses ayant un contrat d'origine sont en situation de dépendance totale par rapport à leur employeur, on ne leur paye pas leurs heures supplémentaires, ni les jours fériés. Alors qu'elles viennent travailler pendant l'ensemble de la saison, elles ne peuvent revendiquer que 18 jours de travail par mois, et dans la réalité, ce devoir de l'employeur envers ses travailleurs n'est pas plus respecté que les autres. Elles sont de plus soumises à une période d'essai de quinze jours pendant laquelle elles peuvent être renvoyées dans leur pays si l'employeur n'est pas satisfait de leur travail, sans que l'employeur ni son syndicat ne leur paye le billet de retour en autobus.

66 Emmanuelle Hellio: En Andalousie, on importe des femmes pour exporter des fraises 2007.

La stratégie mise en place par le Maroc pour impliquer la communauté marocaine résidant à l'étranger dans le développement du pays consiste à "transformer la fuite des cerveaux" en un "gain de compétences", à travers leurs investissements, des réseaux de contacts et de projets, le transfert des connaissances et d'autres formes de collaboration, a-t-il dit. Cette démarche favorise également le développement du Maroc et la mise à profit de ses ressources humaines dans des secteurs hautement qualifiés, notamment l'ingénierie du développement économique et social, la recherche scientifique et les technologies de l'information,

Impact du retour

Le Haut commissariat au Plan a réalisé en 2003 une enquête sur les MRE qui sont retournés au Maroc[67]. 66,1% d'entre eux affirment vivre mieux depuis leur retour. Analphabètes, dans leur majorité, ils font partie de la première vague d'émigrants qui avait quitté le Royaume durant les années 60. L'étude se décline en quatre axes, à savoir le profil démographique et socio-économique des migrants de retour, leurs parcours migratoires, les conditions de leur insertion économique et sociale au Maroc et l'impact de leur séjour à l'étranger. Concernant le premier volet, « ces migrants ont eu un parcours relativement long puisque près de 58 % d'entre eux ont séjourné à l'étranger pour une durée supérieure à 20 ans et 72,5% d'entre eux sont âgés de plus de 60% ». Selon cette enquête, les MRE de retour sont en majorité analphabètes puisque près des deux tiers (61 %) sont sans niveau scolaire. En outre, 12,4 % des enquêtés ont à peine fréquenté le niveau du préscolaire coranique. La proportion des personnes ayant acquis un niveau d'instruction supérieur atteint seulement 3,3 %.

Les données de l'enquête en matière de maîtrise de la langue du pays d'accueil, qui est un outil fondamental pour l'intégration, révèlent une situation d'isolement linguistique relativement important des enquêtés. « Près de 27 % ne connaissent pas la langue du pays d'accueil et seulement 19,8% savent la lire et l'écrire, bien que 53,5% arrivent à parler cette langue ».

Sur le plan de leur réinsertion, le rapport de l'enquête indique que la réinstallation des MRE au Maroc semble globalement se dérouler dans de bonnes conditions. 66,1% affirment vivre mieux depuis le retour au Maroc contre 18% qui soutiennent le contraire. Néanmoins, ce retour n'est pas toujours conçu comme un projet définitif puisque 18,4% ont exprimé leur intention de migrer de nouveau.

L'enquête a démontré que les migrants de retour au pays ont tendance à investir dans les activités tertiaires (26,9%) notamment le commerce, les activités secondaires (15,2%) ou le secteur primaire (12,4%). En outre, l'étude a mis en évidence la contribution des MRE au développement économique de leurs localités d'origine: 53,1% d'entre eux ont participé au financement d'au moins un équipement collectif, avec en tête les mosquées, suivies par l'alimentation en eau potable, les routes et les projets d'électrification rurale.

Plus de la moitié (57,2%) des chefs de ménage résidant à l'étranger envisagent de se réinstaller au Maroc. Cette proportion est de 52,8% parmi les conjoints des chefs de ménage. Il en découle que si les intentions de la réinstallation sont plutôt partagées par les chefs de ménage et leurs conjoints, elles ne le sont manifestement pas, par les enfants de sexe masculin ou de sexe féminin.

Différenciées selon le pays de résidence, les intentions du retour définitif sont beaucoup plus fréquentes parmi les MRE d'Italie en comparaison avec le reste des pays d'accueil. Dans ce pays, l'intention du retour est massivement envisagée aussi bien par les MRE chefs de ménage (62,0%) que par leurs conjoints (61,4%) et leurs enfants de sexe masculin (43,6%) ou féminin (45,4). Il y a en second lieu l'Espagne où ces proportions s'établissent à 61,5%, 57,5%, 45,0% et à 42,4%, respectivement. On retrouve, par la suite, la Hollande avec 60,4%, 54,2%, 30,6% et 29,6%, respectivement.

67 Réalisée entre octobre 2003 et janvier 2004 dans les régions du Grand Casablanca et du Souss-Massa-Drâa, cette enquête a pour objectif d'étudier les différents aspects du phénomène de la migration de retour.

C’est ainsi que 40,7% des MRE, chefs de ménage, tentés par le retour définitif, résident aujourd’hui en France, 24,2% en Espagne, 16,0% en Italie, 7,7% en Hollande, 7,6% en Belgique et 3,8% dans le reste des pays européens. L’examen des raisons du retour selon le pays de résidence permet d’apporter un premier éclairage sur les mobiles de la réinstallation au Maroc.

Pour les MRE envisageant la réinstallation au Maroc, le désir de vivre avec ou près de la famille restée au pays d’origine constitue la première raison, en justifiant 41,2% des intentions de retour définitif. La seconde raison est d’ordre économique, dans la mesure où 27,0% des intentions de retour sont justifiées par la disposition d’un projet au Maroc. L’insatisfaction des attentes des MRE, exprimée à travers la cause ‘Non satisfait à l’étranger’, explique elle aussi une fraction non négligeable (14,7%) de telles intentions. Il faut cependant noter que 17,2% de MRE songent à cette migration de retour pour des raisons autres que familiale, économique ou d’insatisfaction au pays d’accueil.

Le fait d’avoir un projet au Maroc est le mobile le plus associé au retour définitif des MRE de l’Italie (38,4%), de l’Espagne (26,2%) et de la France (25,2%). L’importance relative de ce mobile est aussi sensible dans des pays comme la Belgique (22,3%) et la Hollande (20,0%).

Les raisons qui sont à la base de la pérennisation de la migration varient selon le pays d’accueil. La raison ‘Avenir assuré au pays d’accueil’ justifie l’équivalent de la moitié des cas de pérennisation de la migration en Espagne (52,3%) et en Italie (44,9%) et entre 2 à 3 cas sur 10 en Belgique (31,1%), en Hollande (26,8%) et en France (25,6%).

Les MRE, chefs de ménage, propriétaires, aux pays d’accueil, de leurs logements de résidence ou d’un avoir productif ne sont, dans l’ensemble, que légèrement moins tentés par la migration de retour (56,3%) que le reste des MRE (57,5). Ceux qui projettent d’investir dans le pays d’accueil le sont aussi à raison de 53,4%, contre 58,1% pour le reste des MRE.

L’obtention de la nationalité du pays d’accueil décourage les intentions de la réinstallation des MRE à leur pays d’origine. Les MRE qui ont obtenu la nationalité en question sont moins intéressés par la migration de retour (53,8%), en comparaison avec ceux qui ne l’ont pas encore obtenue ou demandée (59,2%).

Le cursus scolaire du chef de ménage n’explique pas à lui seul l’intensité des intentions de retour. La capacité des enfants du chef de ménage à réussir leurs études contribue, elle aussi, à la formation de la décision de la migration de retour parmi les chefs de ménage.

Les MRE chefs de ménage dont le conjoint vit encore au Maroc sont plus tentés par la réinstallation (69,4%) en comparaison avec ceux qui vivent au pays d’accueil avec leur conjoint (57,0%).

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Annexes

Annexe 1. Quelques limites des sources d'information sur l'emploi
La diversité de ces sources ne garantit pas l'exhaustivité et l'intégrabilité des données sur l'emploi. A cet égard, quelques limites peuvent être relevées:

La lecture des dossiers méthodologiques des recensements et enquêtes auprès des ménages, fait ressortir le caractère répétitif de quatre questions sur l'emploi, à savoir, le type d'activité, le statut professionnel, la profession et la branche d'activité économique. Ceci dit, certains aspects très pertinents et indéniables pour une meilleure connaissance du marché du travail sont relégués. Ainsi, toute tentative ambitieuse d'analyse se heurte dés le début au manque de données spécifiques sur un nombre de facteurs qui influencent substantiellement la configuration et la segmentation du marché du travail. Les contraintes les plus importantes sont relatives à la diversité des données disponibles et à leur qualité. Et il va sans dire qu'elles influent sur les indicateurs à construire et les constats à relever.

Tout d'abord, l'adéquation formation-insertion sur le marché du travail, les conditions d'insertion professionnelle, les disparités et les trajectoires salariales dès le premier emploi et les effets gendoriels sur l'évolution des salaires, ne sont appréhendés par aucune source d'informations directe ou indirecte. En outre, certains aspects non moins importants sont également méconnus: la conciliation vie familiale-vie professionnelle, la mobilité professionnelle, la mobilisation de la force du travail par les entreprises, les conditions du travail (accidents, hygiène et santé, etc.), la mobilité sociale, la transmission intergénérationnelle des métiers et compétences, l'emploi des immigrés clandestins, etc.

Une autre difficulté d'ordre méthodologique découle de la conception des variables utilisées et la consistance analytique de leurs modalités; l'information individuelle sur certains variables (situation dans la profession, secteur d'emploi, catégorie socioprofessionnelle, régularité dans l'emploi, etc.) n'est pas prise en termes d'inégalité d'accès, mais plutôt comme un reflet d'une structure donnée. Procéder de cette façon conduit à ignorer l'impact de l'inégalité d'accès à certaines catégories d'emploi sur la formation et les écarts des salaires, la mobilité professionnelle, l'inadéquation formation-insertion, le sous-emploi, etc. (K.Soudi, 2006).

Toujours est-il que les données disponibles sont de nature quantitative. Les aspects qualitatifs sur l'emploi sont rarissimes. Là-dessus, les sources d'information existantes ne disent rien sur les attitudes, les motivations de l'emploi, les rapports homme-travail-entreprise, la perception des risques professionnels, etc. C'est dire que le champ qualitatif de l'emploi est en voie de défrichement et nécessite un regain d'intérêt pour une meilleure connaissance du fonctionnement du marché du travail.

A l'heure actuelle, les données sur l'emploi, émanant des recensements et enquêtes, renseignent essentiellement sur des aspects quantitatifs de l'offre de travail. Les questions abordées permettent de saisir les caractéristiques démo-socio-économiques de la population et d'établir des démarcations entre l'occupation, le chômage et l'inactivité. Nonobstant, les aspects et les caractéristiques de la demande de travail émanant des entreprises demeurent limités et épars. Pareille limite rend difficile la compréhension des mécanismes régulateurs de l'offre et de la demande d'emploi. Quant aux sources administratives, supposées combler en partie les lacunes d'informations relatives à l'offre de l'emploi, elles sont moins mobilisées et leurs données disponibles sont non seulement sommaires mais également incomplètes.

Devant cette situation, le marché du travail, sectoriel soit-il ou global, demeure méconnu. En effet, devant la rareté des données sur la demande de travail, l'approche préconisée consiste à esquisser le profil du marché de travail via le biais des structures de la population active dans le sens offre de travail afin de dégager une image type sur les secteurs pourvoyeurs d'emploi.

L'une des limites accablantes est le retard constaté dans la diffusion des résultats de certaines sources d'informations. Tel retard ne fait que perdre la pertinence et l'utilité conjoncturelle des indicateurs élaborés. Si le Maroc a réussi la diffusion des indicateurs trimestriels sur l'emploi, il n'empêche que le passage à l'élaboration et la diffusion des indicateurs mensuels, serait décisif pour la gestion à court terme du marché du travail dans le but éventuellement de redresser les déséquilibres conjoncturels.

Sur le plan institutionnel, le manque d'une structure de coordination entre les producteurs et les utilisateurs des informations sur l'emploi, ne fait que perpétuer cette désintégration entre les sources directes et indirectes, d'une part, et, d'autre part, approfondir le gap entre les producteurs et les utilisateurs des ces informations. De surcroît, il serait difficile d'identifier les vrais besoins en informations statistiques sur le marché du travail. Encore faut-il préciser que dans ce contexte, il serait difficile de promouvoir la «traçabilité statistique» en termes d'harmonisation et de normalisation des concepts, méthodes et nomenclatures.

La diversité de ces sources ne garantit pas l'exhaustivité et l'intégrabilité des données sur l'emploi. A cet égard, quelques limites peuvent être relevées:

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A l'heure actuelle, les données sur l'emploi, émanant des recensements et enquêtes, renseignent essentiellement sur des aspects quantitatifs de l'offre de travail. Les questions abordées permettent de saisir les caractéristiques démo-socio-économiques de la population et d'établir des démarcations entre l'occupation, le chômage et l'inactivité. Nonobstant, les aspects et les caractéristiques de la demande de travail émanant des entreprises demeurent limités et épars. Pareille limite rend difficile la compréhension des mécanismes régulateurs de l'offre et de la demande d'emploi. Quant aux sources administratives, supposées combler en partie les lacunes d'informations relatives à l'offre de l'emploi, elles sont moins mobilisées et leurs données disponibles sont non seulement sommaires mais également incomplètes.

Devant cette situation, le marché du travail, sectoriel soit-il ou global, demeure méconnu. En effet, devant la rareté des données sur la demande de travail, l'approche préconisée consiste à esquisser le profil du marché de travail via le biais des structures de la population active dans le sens offre de travail afin de dégager une image type sur les secteurs pourvoyeurs d'emploi.

L'une des limites accablantes est le retard constaté dans la diffusion des résultats de certaines sources d'informations. Tel retard ne fait que perdre la pertinence et l'utilité conjoncturelle des indicateurs élaborés. Si le Maroc a réussi la diffusion des indicateurs trimestriels sur l'emploi, il n'empêche que le passage à l'élaboration et la diffusion des indicateurs mensuels, serait décisif pour la gestion à court terme du marché du travail dans le but éventuellement de redresser les déséquilibres conjoncturels.

Sur le plan institutionnel, le manque d'une structure de coordination entre les producteurs et les utilisateurs des informations sur l'emploi, ne fait que perpétuer cette désintégration entre les sources directes et indirectes, d'une part, et, d'autre part, approfondir le gap entre les producteurs et les utilisateurs des ces informations. De surcroît, il serait difficile d'identifier les vrais besoins en informations statistiques sur le marché du travail. Encore faut-il préciser que dans ce contexte, il serait difficile de promouvoir la «traçabilité statistique» en termes d'harmonisation et de normalisation des concepts, méthodes et nomenclatures.

Annexe 2. Les sources d'information sur l'émigration marocaine

Mis à part les quelques efforts récents au sein de l'Observatoire de la Communauté Marocaine à l'Etranger, qui relève de la Fondation Hassan II pour les Marocains Résidant à l'Etranger, aucun organe ne se charge clairement de statistiques sur les flux migratoires internationaux. C'est surtout l'absence de continuité dans les efforts qui en est la principale entrave. En 1990, on avait crée un Ministère chargé de la communauté marocaine à l'étranger (CME) converti après en sous-secrétariat d'Etat chargé de la CME qui a cessé en 1997.

Aujourd'hui, et depuis novembre 2002, c'est le Ministère, délégué auprès du Ministre des Affaires Etrangères et de la Coopération, Chargé de la Communauté Marocaine Résidant à l'Etranger qui s'occupe de cette sous-population. Mais ce département manque visiblement de moyens humains et matériels suffisant pour détenir un système statistique fiable.

Toutefois, les recensements et les enquêtes peuvent fournir des informations sur cette sous populations. Des statistiques sous produites peuvent également être exploitées. Des données sont continuellement recueillies par les différentes unités consulaires présentes au Maroc. Mais il s'agit uniquement des migrants légaux obligés de demander le visa au consulat du pays auquel ils veulent se diriger.

1. Les recensements

Le recensement de la population constitue une source assez fiable pour l'examen de quelques aspects de la migration, notamment la population étrangère du Maroc et, dans une moindre mesure, la migration de retour. Mais, au Maroc le recensement intervient tous les dix ans, période, assez longue, qui pose problème quant à l'obtention des données intercensitaires.

Le recensement comporte des questions sur le lieu de naissance, le lieu de résidence à un moment fixé dans le passé, le lieu de résidence précédente, la durée de résidence et la nationalité. Leur exploitation, à des fins d'étude de l'émigration internationale, reste, toutefois, très partielle et la publication des résultats qui en découlent, est rarement entreprise[68]. Par ailleurs, le recensement permet d'estimer le solde migratoire national, après déduction du solde naturel de l'accroissement global de la population.

2 Les enquêtes statistiques

Les enquêtes auprès des ménages, qu'elles soient sur la démographie ou sur l'activité et l'emploi, ont parfois comporté des volets sur les migrations internationales. Mais la faible taille de leurs échantillons constitue généralement un sérieux handicap à toute mesure correcte du phénomène. Il y a lieu de noter toutefois que certaines enquêtes spécifiques constituent des sources très riches sur les migrations internationales au Maroc. Mais, sans vouloir mésestimer les travaux effectués précédemment, la plupart des enquêtes sont à caractère monographique et/ou leurs méthodes de sondage sont peu sûres. Les enquêtes qui reposent sur un échantillon vraiment aléatoire sont rares. Certaines enquêtes ont utilisé la méthode des quotas faute de moyens adéquats. Mais le recours à cette méthode paraît particulièrement mal adapté à une enquête spécifique sur la population émigrée. La nécessité de limiter le coût d'enquête conduit forcément à présélectionner les lieux d'enquête où l'on a de fortes chances d'en rencontrer.

La première investigation d'ordre empirique sur les migrants marocains réalisée au Maroc, remonte à l'année 1975 par un groupe de chercheurs de l'Institut National de Statistique et d'Economie Appliquée (INSEA). Les données sont celles d'une enquête qui a porté sur près de 2.500 migrants ayant quitté le pays entre 1904 et 1976. L'enquête s'est limitée au rural des deux régions qui étaient alors les plus grandes émettrices de main d'œuvre marocaine à l'étranger, à savoir le rif oriental

68 Exception faite de l'étude sur "Les résidents étrangers au Maroc" réalisée par la Direction de la Statistique.

(Nador et Al Hoceima) et le Souss (Agadir et Tiznit). L'objet de cette recherche était de décrire l'évolution de la migration dans le temps, d'identifier les caractéristiques des migrants et des non migrants et l'impact des migrations sur les ménages et sur les zones rurales et urbaines.

Dans la même lignée de la première enquête, d'autres ont suivi. Les objectifs sont presque toujours les mêmes et l'utilité principale est la comparaison pour dégager les évolutions réalisées dans le temps, que ce soit pour les motifs de la migration, ces effets que pour les profils des migrants. Quelques nouvelles préoccupations ont été intégrées, surtout la nature des investissements et les montants investis par les migrants dans le pays.

La dernière enquête en date remonte à l'année 1998. Elle porte sur quelques 1.200 migrants et est effectuée également par l'INSEA et le FNUAP sur les ferries dans la zone de transit à Tanger pendant le grand retour de l'été 1998. Entre temps, d'autres enquêtes dont l'intérêt principal est l'étude de la migration marocaine ont été effectuées. Il s'agit notamment de l'enquête sur la réinsertion des migrants de retour au Maroc, réalisée en 1992 par l'Organisation Arabe du Travail.

On ne peut terminer cette énumération des enquêtes marocaines, sources de données sur les caractéristiques des migrants, sans citer les enquêtes du CERED et de la Direction de la Statistique (DS) qui, sans avoir comme principal objet l'étude de la migration, contiennent des modules qui s'y réfèrent[69].

3 Les données sous-produites des administrations

En plus des recensements et des enquêtes, il existe un grand nombre d'administrations et institutions qui enregistrent des informations sur divers aspects des migrants dans le cadre de leurs attributions. Sans vouloir les énumérer toutes on cite en particulier les services douaniers, la sûreté nationale, l'Office des Changes, la poste et les banques.

Les services douaniers et la Sûreté Nationale disposent des statistiques recueillies dans les postes frontaliers (terrestres, maritimes et aériennes). Les passagers renseignent obligatoirement les cartes aux frontières, ce qui donne lieu à l'établissement de tableaux statistiques sur les entrées et sorties par mois avec, en général, une distinction entre les résidents et les non-résidents d'une part, les nationaux et les étrangers d'autre part.

En outre, les banques sont pour la plupart dotées d'une cellule, voire d'une direction MRE, en plus de leurs représentations dans les pays d'accueil. Elles détiennent ainsi des informations précieuses sur les diverses transactions financières des émigrés (dépôts, comptes chèque ou sur carnet, crédits, investissements, etc.). Quant à l'office des changes, il détient des informations sur les transferts financiers des émigrés par catégories et par pays.

Source: Quelles sources pour l'estimation de l'immigration marocaine en Italie: comparaison entre pays d'origine et pays d'accueil Brahim El Mouaatamid et Roberta Pace.

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69 Il s'agit notamment de l'Enquête Démographique à Passages Répétés (ENDPR-1986/87), de l'Enquête Famille (CERED-1995) et de l'Enquête Nationale sur le Niveau de vie des Ménages (ENNVM-1998/99) et de l'enquête sur la migration de retour en cours (CERED, 2004).

Chapter II – National Background Paper

Labour Markets Performance and Migration Flows in ALGERIA

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SECTION 1. L'OFFRE DE TRAVAIL EN ALGERIE: SITUATION ET PERSPECTIVES

Au cours des dernières décennies, la population algérienne a connu une décélération de son rythme de croissance passant d'une moyenne de 3,1% au cours des années 75-85 à 1,6% vingt ans plus tard entre 1995 et 2005. Cette tendance démographique a été portée par une évolution à la baisse du taux de fécondité bien que le taux de mortalité, notamment infantile, ait connu parallèlement une forte diminution. La contraception, le recul de l'âge du mariage, l'insertion des femmes dans la vie active, l'urbanisation ont eu pour conséquence de faire baisser le taux de fécondité et sont parmi les facteurs souvent invoqués pour expliquer cette transition démographique.

Il faut toutefois noter une reprise de la croissance démographique au cours des cinq dernières années. L'excédent naturel -différence entre les naissances et les décès totaux- qui est passé de 449.000 en 2000 à 634.000 en 2007- a accéléré la croissance annuelle de la population qui est passée de 1,5% en à 1,9% entre 2000 et 2007.

Tableau 1. Evolution de la croissance démographique 1989-2008

Année	**1985**	**1986**	**1987**	**1988**	**1989**	**1990**	**1991**	**1992**	**1993**	**1994**	**1995**	**1996**
Population (en millier)	21863	22512	23139	23783	24409	25022	25643	26271	26894	27496	28060	28566
Taux de Cce démograph.	3,3%	3,0%	2,8%	2, 8%	2,6%	2,5%	2,5%	2, 5%	2,4%	2,2%	2,0%	1,8%
	1997	**1998**	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
Population (en millier)	29045	29507	29965	30416	30879	31357	31848	32364	32906	33481	34096	34722
Taux de Cce démograph.	1,7%	1,6%	1,6%	1,5%	1,5%	1,5%	1,6%	1,6%	1,7%	1,8%	1,8%	1,8%

Source ONS 2008

1.1 Evolution démographique et projections

La projection de la population nécessite des hypothèses sur l'évolution des trois sources de changement de la taille d'une population que sont (i) le taux de fécondité des groupes susceptibles de procréer et qui détermine le nombre de naissances au sein de la population, (ii) le taux de mortalité et (iii) l'émigration internationale.

Des projections de la population algérienne ont été réalisées par l'ONS, le CNES et l'UNDP selon plusieurs variantes. Celles de l'ONS, qui portent sur l'horizon temporel 2000-2030 retiennent comme hypothèses :

- une réduction de 50% de la mortalité jusqu'en 2010 puis une diminution de 35% en 2020 puis de 25% en 2030,
- un Indice synthétique de fécondité qui devrait atteindre, dans l'hypothèse médiane, 2,1 enfants par femme à l'horizon 2010 pour se stabiliser à ce niveau sur le reste de la période de projection,
- un solde migratoire internationale nul faute de données pertinentes.

La méthode des cohortes est souvent utilisée dans les projections démographiques[70]. Le tableau suivant présente les résultats des projections réalisées par l'ONS suivant l'hypothèse probable :

Tableau 2. Projection de la population 2005-2030

	2005			**2010**		**2015**			**2020**		
	Hom-Mes	**Fem-mes**	**Total**	**Hom-mes**	**Fem-Mes**	**Hom-mes**	**Fem-mes**	**Total**	**Hom-mes**	**Fem-Mes**	**Total**
0-14 ans	4 840	4 637	9 477	4 625	4 418	4 758	4 540	9 299	5 023	4 783	**9 806**
15-19	1 923	1 856	3 779	1 773	1 705	1 534	1 466	3 000	1 507	1 445	**2 952**
20-24	1 880	1 813	3 693	1 915	1 852	1 767	1 702	3 469	1 529	1 464	**2 994**
25-29	1 602	1 565	3 167	1 870	1 808	1 907	1 848	3 755	1 760	1 698	**3 459**
30-34	1 338	1 324	2 663	1 593	1 559	1 860	1 803	3 663	1 899	1 843	**3 742**
35-39	1 138	1 131	2 269	1 329	1 318	1 584	1 553	3 136	1 852	1 796	**3 648**
40-44	920	908	1 828	1 129	1 123	1 319	1 310	2 629	1 574	1 544	**3 118**
45-49	739	735	1 473	909	899	1 117	1 113	2 230	1 308	1 300	**2 607**
50-54	613	598	1 211	725	724	895	887	1 782	1 102	1 100	**2 202**
55-59	426	434	860	596	585	707	710	1 417	875	871	**1 746**
60-64	329	347	676	408	419	572	567	1 139	682	690	**1 372**
65+	819	880	1 699	938	1 031	1 103	1 222	2 325	1 393	1 520	**2 914**
TOTAL	**16 568**	**16 227**	**32 795**	**17 807**	**17 441**	**19 123**	**18 721**	**37 844**	**20 504**	**20 056**	**40 560**

Source ONS 2004

La chute du taux de fécondité constatée à partir de 1986 aura un impact sur les différents groupes d'âge échelonné dans le temps. Cela entraînera une phase de transition longue au cours de laquelle la structure démographique peut connaître de profonds changements notamment dans le rapport entre la population jeune et la population de plus de 30 ans, les populations dépendantes et la population en âge de travailler etc. Cette transition démographique s'observe dans la figure ci-dessous qui présente l'évolution de la part des différents groupes d'âge dans la population totale suivant les projections de l'ONS. On constate que la distribution de la population et son mode, à savoir la classe d'âge prédominante, se déplace vers la droite de sorte que la catégorie de population prédominante deviendra de plus en plus âgée.

70 Suivant cette méthode, les projections entre t-1 et t des naissances ($N_{t-1,t}$), des décès ($D_{t-1,\ t}$) et des flux migratoires ($M_{t-1,\ t}$) par groupes d'âge-sexe sont introduits dans une équation dynamique décrivant l'évolution de la population :

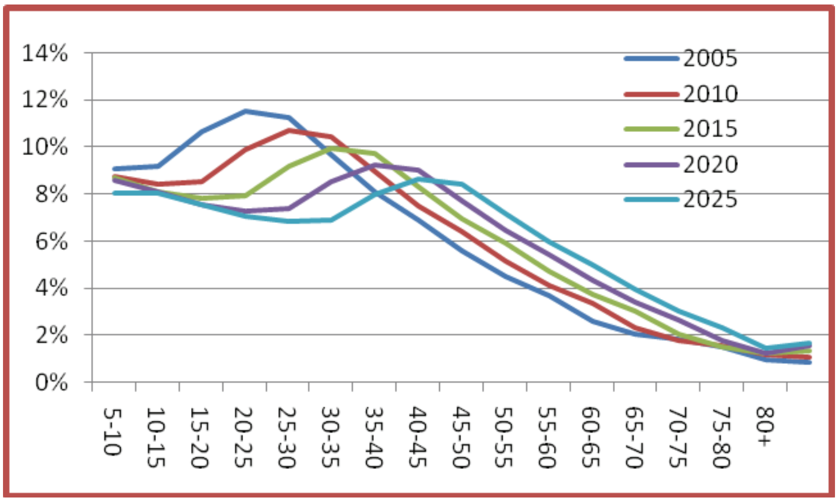
$P_t = P_{t-1} + N_{t-1,t} - D_{t-1,t} + M_{t-1,t}$.

Dans le cas où la projection porte sur les différentes classes d'âge, l'évolution de la population des différents groupes d'âge (la taille de la première cohorte 0 et l'évolution des suivantes indexées par a) sera :

$P_t(0) = N_{t-1,t} - D_{t-1,t}(0) + M_{t-1,t}(0)$

$P_t(a) = P_{t-1}(a-1) - D_{t-1,t}(a) + M_{t-1,t}(a)$

Figure 1 : Projection de la population par groupes d'âge et transition démographique en Algérie



Source ONS 2004

Plus particulièrement, sous les hypothèses de la projection, les remarques suivantes peuvent être faites :

- La population algérienne atteindra suivant ces projections 40,56 millions en 2020.
- La part de la population jeune en âge de travailler (15-29ans) dans la population totale décroîtra tout au long de la période de projection sachant que les enfants nés durant la période de chute de la fécondité (1986) auront eu 15 ans en 2001.
- Le taux de dépendance qui représente le rapport entre la population dépendante (0-15 ans et plus de 64 ans) et la population en âge de travailler qui était de plus de 100 en 1970 décroît jusqu'en 2015. Cette situation peut être favorable du fait que la population dépendante est inactive et se trouve dans une phase de désépargne de son cycle de vie. Elle représente toutefois un défi car pour être pleinement favorable, encore faudrait-il que la population en âge de travailler soit occupée et productive.

Tableau 3. Evolution de la population jeune et du taux de dépendance

	2005	**2010**	**2015**	**2020**	**2025**
Pop. jeune en âge de travailler (15-29) en pourcentage de la pop. totale	32,4%	31,0%	27,0%	23,2%	20,8%
Taux de dépendance	51,7%	45,4%	44,3%	45,7%	47,2%

Source : calculs d'après ONS 2004

1.2 Les caractéristiques de la population active

Ces tendances démographiques vont naturellement affecter directement l'évolution de la population active et la configuration du marché de travail.

La définition de la population active que retient l'ONS depuis quelques années est celle du BIT[71]. Sur la période récente, la population active, malgré les difficultés de son estimation, continue de

71 Voir encadré la méthodologie d'évaluation de l'ONS des taux de chômage, de la population occupée et de la population active

croître à un rythme supérieur à celui de la population totale malgré une accélération de cette dernière durant les cinq dernières années[72].

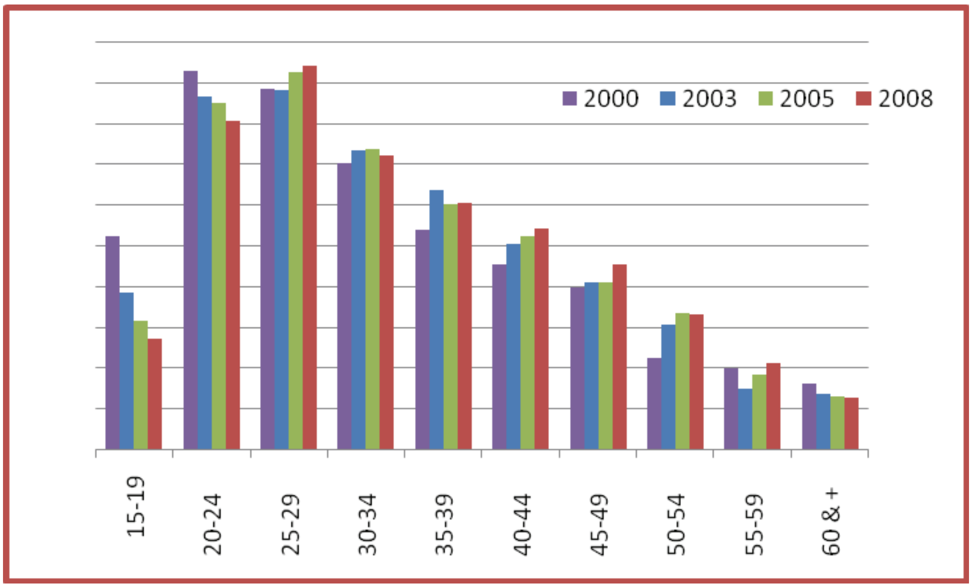
Tableau 4. Evolution de la population active 2003-2008

Année	2003	2004	2005	2006	2007	2008	Moyenne 2004-2008
Population active	8 762, 3	9 470,0	9 492,5	10 109,6	9 968,9	10 315,0	
Croissance Annuelle	/	8,1%	0,2%	6,5%	-1,4%	3,5%	3,4%

Source : ONS

Toutefois, la structure par âge de la population active reste marquée par un relatif retrait de la population d'âge compris entre 15 et 24 ans. Cette évolution est probablement due à un temps plus long consacré à l'éducation et à la formation qui retarde l'entrée des jeunes sur le marché du travail.

Figure 2 : Evolution de la population active par groupes d'âge



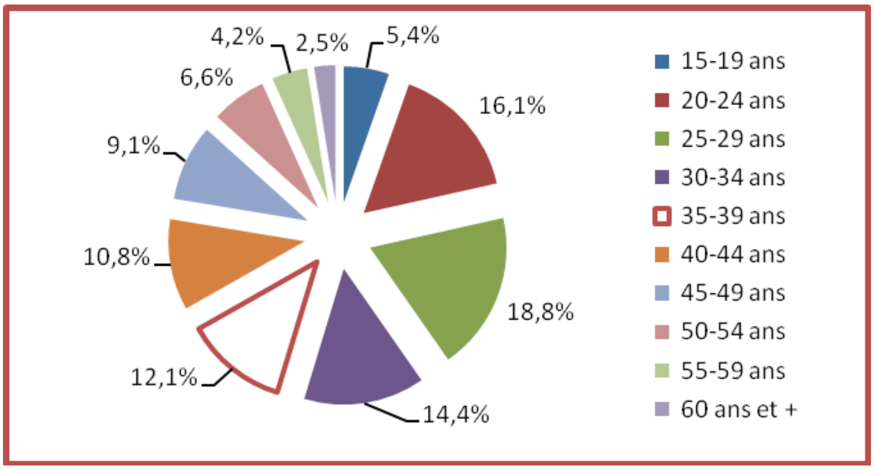
Source : ONS

Cette évolution dans la structure par âge de la population active ne remet cependant pas en cause la prédominance des jeunes demandeurs d'emplois sur le marché du travail. La catégorie de la population active d'âge compris entre 15 et 29 ans représente encore en 2008 plus de 40% de la population active totale. Elle était de 46,5% en 2000.

72 Pour mémoire, selon le Plan, la population active a évolué suivant:

Année	2003	2004	2005	2006	2007	2008	Moyenne 2003-2007
Population active	9 540	9 780	10 027	10 267		/	
Croissance Annuelle			2,5%	2,4%			2,5%

Figure 3 : Répartition de la population active par groupes d'âge - 2008



La contribution féminine à l'évolution de la population active reste relativement marginale du fait d'un taux de participation des femmes exceptionnellement faible. Néanmoins, la dynamique du taux de participation féminin fait apparaître une tendance positive. Avec toutes les imprécisions de sa mesure, il passe de 11,8% en 1996 à 15,1% en 2008.

Tableau 5. Evolution du taux de participation féminin
(en pourcentage de la population féminine en âge de travailler)

	2001	2003	2004	2005	2006	2007	2008
Taux de participation Féminin	13,4	12,3	15,9	12,4	16,0	14,7	15,1
Part des femmes dans la population active totale	15,0	14,3	17,5	15,0	17,3	16,5	16,8

Source : ONS

Chaque année en moyenne, une population nouvelle de plus de 95.000 femmes arrive sur le marché du travail. Cette population active féminine est davantage localisée dans les milieux urbains : sur la moyenne de la période 2001-2008, 74% de la population active féminine est urbaine contre 57% de la population active masculine. Le relèvement du niveau d'éducation et de qualification des filles est également positivement relié à leur participation au marché du travail. La dégradation du niveau de vie est parfois également avancée comme facteur déterminant au sens où, face à la pauvreté et au chômage, les ménage ont besoin de revenus supplémentaires, dont ceux du travail des femmes. Cependant, une augmentation du niveau de vie peut également traduire une augmentation des salaires et, partant, une augmentation du coût d'opportunité de l'inactivité. Au total, l'effet du niveau de vie sur l'arbitrage des femmes dans l'allocation de leur temps disponible entre la vie active et l'inactivité serait plutôt ambigu.

1.3 Une projection de la population active

Le taux de participation féminin

L'un des paramètres déterminant dans la projection de la population active est le taux de participation des femmes du fait d'un certain nombre de spécificités parmi lesquelles les contraintes auxquelles la femme doit faire face durant son cycle de vie. La participation des femmes diminue souvent à l'âge de 24-49 ans. On observe une relation décroissante entre le taux de fertilité et le taux de participation des femmes. Un niveau d'instruction élevé peut favoriser une plus forte intégration à la population active. Si ce facteur est certainement réel il ne peut cependant expliquer à lui seul les évolutions de l'activité féminine. Le cas de l'Algérie en lui-même révèle sûrement que le niveau de participation reste en deçà de ce qui est attendu de par l'effort d'instruction de la population féminine, de sorte que d'autres facteurs devraient être invoqués pour cerner les évolutions de la participation féminine (normes sociales, discriminations qui découragent leur recherche d'emploi, niveau d'urbanisation de la population, niveau de vie..).

Cette 'indétermination' des facteurs explicatifs du taux de participation féminin [73]dans des sociétés à architecture sociale, culturelle et économique insuffisamment étudiées, rend difficile une projection de la population active féminine[74]. Plutôt qu'une analyse lourde des différents facteurs déterminant le taux de participation - nécessitant non seulement la spécification adéquate d'un modèle mais également la disponibilité de sources statistiques pour son estimation - l'observation, d'une part, d'une réduction de l'écart entre les taux de participation des femmes et des hommes en Algérie, et, d'autre part, de taux de participation des femmes dans les pays développés convergeant vers celui des hommes, nous a amené à formuler l'hypothèse simple mais forte d'un rattrapage à plus ou moins long terme de la participation totale féminine. Cette convergence du taux de participation féminine peut alors être formalisée simplement par un processus d'ajustement vers une cible (le taux corrigé de participation des hommes) qui peut être fixe ou mouvante.

Un modèle de convergence

On suppose que le taux de participation masculin tpm_t est constant sur le long terme à un niveau tpm^* et que celui des femmes tpf_t converge vers le taux de participation des hommes. La dynamique du système peut alors être décrite par les équations d'évolution suivantes :

$$tpm_{t+1} - tpm_t = \mu(tpm^* - tpm_t)$$
$$tpf_{t+1} - tpf_t = \lambda(\alpha tpm_t - tpf_t)$$

La première équation décrit l'évolution du taux de participation masculin vers son niveau de long terme tandis que la seconde décrit le processus de rattrapage du taux de participation féminin.

α est un écart 'naturel' entre les taux de participation féminin et masculin persistant sur le long terme. Pour $\alpha = 1$, la convergence est totale. λ renseigne sur la vitesse de rattrapage de la participation féminine.

La projection de la population active

Les écarts entre les taux de participations observés entre les hommes et les femmes ont évolué à la baisse en Algérie bien qu'à un rythme décroissant.

Tableau 6 : Evolution comparée des taux de participation masculin et féminin

73 voir Talahite (2009).

74 L'ONS n'a pas réalisé de projection de la population active. Hammouda (2008b) projette l'évolution de la population active sur l'horizon 2025 sur la base d'une constance du taux de participation des cohortes âge-sexe-instruction à son niveau de 2005. Cette hypothèse semble toutefois discutable car il ne nous semble pas que la structure de la population active féminine soit actuellement stationnaire.

Année	1987	1996	2001	2003	2004	2005	2006	2007	2008
Taux de participation Féminin (en%)	7,8	11,8	13,4	12,3	15,9	12,4	16,0	14,7	15,1
Taux de participation Masculin (en %)	76,4	77,5	74,6	72,7	73,5	69,1	74,8	72,8	73,5
Ecart (en%)	68,6	65,6	61,1	60,4	57,6	56,7	58,9	58,1	58,4
Taux de participation Total (en %)	42,1	44,9	44,3	42,8	45,0	41,0	45,7	44,0	44,6

Source UNPD pour 1987 et 1996 et ONS pour 2001 et suivantes

On constate que le taux de participation masculin fluctue entre 70 et 75% sans présenter une tendance statistiquement significative. A l'inverse, le taux de participation féminin a presque doublé sur la période 1987-2008. Il reste toutefois malgré son évolution positive, très inférieur à celui des hommes. Si on retient 1987 comme année initiale, on peut estimer la vitesse de rattrapage de la participation féminine à 0,0085. Si cette faible dynamique de convergence se maintient, le taux de participation féminine rattrapera la moitié de son écart initial de 1987 en 80 ans (durée de demi-vie). Il faut néanmoins noter que les données de base présentées semblent sujettes à des erreurs de mesure car elles sont trop volatiles pour exprimer un comportement rationnel des individus. On observe par exemple une chute sévère des taux de participations des deux sexes en 2005 alors même que la tendance autour de cette date est à la baisse du taux de chômage et que des politiques actives devant infléchir les anticipations vers l'optimisme et la recherche d'emplois sont annoncées.

Dans les simulations présentées, on supposera que :

- le taux de participation des hommes de long terme (2025) atteindra 75% de la population masculine en âge de travailler,
- la vitesse d'ajustement du taux de participation féminin sera suivant les scénarios égale à 0,01 et 0,015.

Les deux tableaux ci-dessous présentent la dynamique des taux de participation et l'évolution correspondante de la population active suivant les deux variantes.

Tableau 7 : Projection de la population active : (Hypothèse : Vitesse d'ajustement = 0,01)

	Taux Participation		**Population de 15-64ans (projections ONS)**		**Population active**			**Taux partici-pation total**
	Féminin	**Masculin**	**Femmes**	**Hommes**	**Femmes**	**Hommes**	**Totale**	
2008 (est.)	15,08%	73,51%	11 479	11 711	1 732	8 608	10 340	**44,59%**
2009	15,69%	73,73%	11 736	11 978	1 841	8 831	10 672	**45,00%**
2010	16,27%	73,92%	11 992	12 245	1 951	9 051	11 002	**45,39%**
2015	19,14%	74,52%	12 959	13 262	2 480	9 883	12 363	**47,15%**
2020	21,88%	74,79%	13 753	14 087	3 009	10 535	13 545	**48,65%**
2025	24,49%	74,91%	14461	14856	3542	11128	14670	**50,04%**

Source : calcul des auteurs

La deuxième variante suppose que la vitesse d'ajustement du taux de participation féminin est de 0,015. Il s'agit d'une hypothèse haute mais non improbable lorsqu'on tient compte du faible niveau initial de ce taux qui révèle un potentiel important de rattrapage.

Tableau 8 : Projection de la population active : (Hyp : Vitesse d'ajustement = 0,015)

	Taux Participation		**Population de 15-64 ans (projections ONS)**		**Population active**			Taux partici-pation total
	femmes	**hommes**	**femmes**	**hommes**	**femmes**	**hommes**	**Total**	
2008 (est.)	15,08 %	73,51%	11 479,3	11 710,7	1 731,6	8 608,4	10 339,9	44,59%
2009	15,98 %	73,73%	11 735,8	11 977,9	1 875,3	8 830,7	10 706,0	45,15%
2010	16,85 %	73,92%	11 992,2	12 245,1	2 020,8	9 051,1	11 071,9	45,68%
2015	21,07 %	74,52%	12 958,7	13 262,0	2 729,8	9 882,7	12 612,5	48,10%
2020	25,00 %	74,79%	13 752,5	14 087,3	3 438,1	10 535,4	13 973,6	50,19%
2025	28,65 %	74,91%	14 461,4	14 856,0	4 143,3	11 128,0	15 271,2	52,09%

Source : calculs des auteurs

L'accroissement de la population active entre (t-5, t)

L'accroissement de la population active sera alors suivant les deux scénarios :

Tableau 9 : Accroissement de la population active

Variante	Genre	2010(*)	2015	2020	2025
1 (Vitesse d'ajustement moyen)	**Femmes**	110 280	528 676	529 371	532 766
	Hommes	220 406	831 625	652 717	592 528
	Total	330 686	1 360 301	1 182 089	1 125 294
2 (Vitesse d'ajustement rapide)	**Femmes**	145 531	708 939	708 369	705 127
	Hommes	220 406	831 625	652 717	592 528
	Total	**365 938**	**1 540 564**	**1 361 087**	**1 297 655**

(*) Pour 2010, il s'agit de l'accroissement entre 2009 et 2010.

L'accroissement annuel de la population active totale dans le court terme, à l'horizon 2010, sera de l'ordre de 330.000 personnes pour la première variante et de 365.000 pour la seconde. A plus long terme cependant, à l'horizon 2025, cet accroissement annuel devrait décroître du fait de la baisse de la croissance de la population malgré une participation de plus en plus importante de la population féminine. Il se fixera aux alentours de 225.000 à 260.000 personnes suivant la variante retenue.

1.4 Le besoin de création d'emplois

Cette dynamique du marché du travail portée par l'augmentation de la population féminine appelle un effort conséquent de création d'emplois dès le court terme. Le taux de chômage est actuellement à 11,3% et les autorités tentent de le porter rapidement à 10% de la population active. Il est raisonnable de considérer que l'Algérie peut réduire son taux de chômage à 10% en 2010 et le porter à 7% de la population active en 2025. Dans ce cas, la dynamique de création d'emplois sera portée à la fois par la réduction du taux de chômage projetée et l'augmentation du taux de participation des femmes. Le nombre de postes d'emplois à créer pour atteindre ces objectifs sera alors suivant les deux variantes retenues :

Tableau 10 : Estimation du nombre de postes d'emploi à créer en (t-5, t)

Variante	Genre	2010(*)	2015	2020	2025
1 (Vitesse d'ajustement moyen)	**Femmes**	99 252	481 095	487 022	495 473
	Hommes	198 365	756 779	600 499	551 051
	Total	**297 618**	**1 237 874**	**1 087 522**	**1 046 523**
2 (Vitesse d'ajustement rapide)	**Femmes**	130 979	645 135	651 700	655 768
	Hommes	198 365	756 779	600 499	551 051
	Total	**329 344**	**1 401 913**	**1 252 200**	**1 206 819**

Source : calcul des auteurs
(*) Pour 2010, il s'agit de la création d'emplois entre 2009 et 2010.

1.5 La demande de travail

Les performances du marché du travail sont déterminées également par la demande. Au cours de la période 2001-2008, 417.000 postes d'emplois ont été crées en moyenne annuellement portant la croissance de l'emploi à 5,6% par an durant cette période.

Tableau 11 : Evolution de l'emploi en Algérie

	1997	2001	2003	2004	2005	2006	2007	2008
HOMME	4819	5345,2	5751,0	6439,2	6870,4	7371,9	7247,4	7718
FEMME	889	883,5	933,0	1359,3	1173,9	1496,9	1346,9	1428
TOTAL	**5 708**	**6228,8**	**6684,0**	**7798,4**	**8044,2**	**8868,8**	**8594,2**	**9146**

Source : ONS

La création d'emploi a été pendant longtemps l'apanage du secteur public avec un secteur industriel contribuant de façon significative à l'offre de travail. Avec la mise en œuvre des réformes économiques et notamment l'ouverture extérieure et la privatisation des entreprises publiques, la structure sectorielle de l'emploi s'est modifiée profondément. A partir des années 90, le secteur public industriel s'effondre, laminé par la dévaluation qui démultiplie l'endettement externe des entreprises et dégrade leur compétitivité sur le marché national par le gonflement du coût de leurs entrants dans leur grande partie importés. Le secteur privé, auparavant retranché dans certaines niches où il a prospéré surtout grâce aux rentes de situation générées par la protection totale du marché de la concurrence internationale, ne pouvait prendre le relais et subissait de plein fouet la concurrence des produits importés. Aujourd'hui, la VA ajoutée industrielle du secteur privé ne représente que 5% de la VA totale de ce secteur. L'industrie qui contribuait à 18% de la création d'emplois hors agriculture durant la période 67-80 n'en génère plus que 10% en 2007, contribuant ainsi à enfermer davantage l'économie dans la monoexportation et la dépendance des hydrocarbures.

Tableau 12 : Evolution de l'emploi par secteurs d'activité

		67-80	80-90	90-95	1995-2000	2000-2007
Industrie	Cce annuelle moyenne (en%)	10,1	4,5	-5,9	-0,7	0,8
	Contribution à l'emploi total hors agriculture (en %)	*18,7*	*18,6*	*17,8*	*13,8*	*11,9*
BTP	Cce annuelle moyenne (en%)	15,6	4,3	1,2	2,6	7,2
	Contribution à l'emploi total hors agriculture (en %)	*17,8*	*21,9*	*19,0*	*20,2*	*22,7*
Transport et Communication	Cce annuelle moyenne (en%)	7,9	6,3			
	Contribution à l'emploi total hors agriculture (en %)	*6,4*	*6,4*			

Commerce et Services	Cce annuelle moyenne (en%)	3,3	2,4	2,0	3,1	6,1
	Contribution à l'emploi total hors agriculture (en %)	*25,9*	*20,1*	*25,8*	*27,9*	*30,5*
Administration	Cce annuelle moyenne (en%)	6,1	7,8	-1,4	2,2	1,1
	Contribution à l'emploi total hors agriculture (en %)	*31,3*	*33,3*	*37,4*	*38,2*	*34,9*
Ensemble secteurs hors agriculture	Cce hors agriculture	7,3	5,1	-0,8	2,1	4,0

Source : Calculs des auteurs d'après sources diverses

Le commerce et les services - dopés par les importations – ainsi que les transports et communications contribuent au tiers de l'emploi total hors agriculture. L'administration et les BTP, *boostés* par le programme public d'infrastructure (PCSC), contribuent à 57% de l'emploi total. En somme l'Etat est toujours l'employeur principal.

La structure de l'emploi par secteurs juridiques connaît la même rupture à la suite de la mise en œuvre des réformes économiques et du *downsizing* du secteur public qui en a résulté. Le tableau suivant qui retrace l'évolution de la structure de l'emploi montre que l'emploi public durant la décennie 1997-2007 reste à un niveau relativement constant au moment même où le secteur privé voit son volume de création d'emplois doubler.

Tableau 13 : Evolution de l'emploi par secteurs juridiques

Secteur d'activité	**1997**		**2003**		**2005**		**2006**		**2007**	
	Public	**Privé**	**Public**	**Privé**	**Public**	**Privé**	**Public**	**Privé**	**Public**	**Privé**
Agriculture			51	1362	28	1353	30	1580	31	1140
Industrie			304	500	395	664	342	922	311	717
BTP			87	713	87	1125	98	1160	96	1427
Commerce et Services			2216	1452	2454	1939	2277	2461	2549	2323
Total	**2890**	**2818**	**2658**	**4027**	**2964**	**5081**	**2747**	**6123**	**2987**	**5607**

Source : ONS

On s'attend toutefois avec les mesures d'assainissement financier des entreprises publiques, le réinvestissement public dans certaines grandes entreprises ainsi que la prise de participation systématique de l'Etat dans les investissements étrangers à une reprise de l'emploi dans le secteur public.

SECTION 2. LES PERFORMANCES DU MARCHE DU TRAVAIL EN ALGERIE

2.1. Régulation du marché du travail

2.1.1 Régulation légale du travail

Constitution, législation, et conventions

Depuis son indépendance, l'Algérie a connu trois changements constitutionnels majeurs (1976-1988-1996). L'Annexe 1 présente les dispositions relatives au travail dans les constitutions de 1976, 1988 et 1996. L'Algérie est membre de l'OIT depuis 1962. Elle a ratifié 59 conventions, dont 53 sont en vigueur. La liste des ratifications des conventions internationales du travail est reportée en Annexe 2.

Selon un document de l'OIT (2007) évaluant les droits du travail en Algérie dans la perspective de réaliser le "Profil National du travail décent" (PNTD) alors à l'état de projet, bien que l'Algérie ait ratifié les huit conventions fondamentales de l'OIT, la liberté d'association reste limitée. La discrimination fondée sur le sexe serait également, selon ce document - qui ne cite toutefois aucune preuve ou enquête - largement répandue sur le marché du travail. La formation de syndicats doit faire l'objet d'une approbation du ministère du travail. Il n'existe qu'une seule fédération nationale, bien qu'une autre ait été créée mais non reconnue officiellement. Notons que depuis que ce document a été rédigé, l'Algérie a ratifié 5 nouvelles conventions dont 2 sont entrées en vigueur[75].

Modalités légales d'embauche

Le code du travail actuellement en vigueur a été mis en place en 1991, au moment du lancement des grandes réformes économiques[76]. L'évolution de la législation du travail est fondée sur les principes de contractualisation des rapports, de négociation collective et de partenariat social. Cependant, la législation en vigueur ne propose pas aux employeurs un large choix de contrats. La seule législation spécifique vise les contrats à durée déterminée, contrats à temps partiels et contrats d'apprentissage. Ces derniers autorisent les entreprises à recruter des travailleurs en dessous de l'âge minimum légal de 16 ans et à les employer pour une courte durée, avec quelques privilèges accordés en regard de leur âge.

Une autre dérogation à la législation du travail concerne les « entreprises étrangères dont les employés étrangers recrutés sur contrat ne cotisent pas à la Caisse Nationale de Sécurité Sociale (CNAS) et ne sont affiliés à aucune organisation syndicale » (MAEP, 2007), qui ne sont pas tenues d'appliquer la législation algérienne notamment en matière de durée de travail et de salaires, ce qui pourrait être un élément d'explication de la « productivité » de certains travailleurs étrangers. Celle-ci, relativement plus élevée que la moyenne nationale, renverrait ainsi à un contexte institutionnel et juridique précis. Les contrats de main d'œuvre avec des entreprises étrangères seraient le moyen de contourner une législation du travail trop rigide.

Régulation des conditions de travail et de licenciement

Le tableau suivant reprend les principales dispositions de la loi 90-11 d'avril 1990 relatives à la régulation du marché du travail, modifiées et complétées en 1997

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75 Il s'agit des conventions n° 135 concernant les représentants des travailleurs, n° 147 sur la marine marchande, n° 155 sur la sécurité et la santé des travailleurs, n° 167 sur la sécurité et la santé dans la construction et 181 sur les agences d'emploi privées. De plus, elle s'est récemment dotée d'une législation sur la traite des êtres humains.

76 Le droit du travail actuellement en vigueur figure sur le portail du droit algérien http://lexalgeria.free/social.htm - qui n'est pas un site officiel - sous la rubrique « droit du travail ». Cependant, il est indiqué que beaucoup de textes ne sont pas à jour.

Tableau 14 : Dispositions relatives à la régulation du marché du travail

articles	Objet	Disposition
art 2	définition du travailleur	tous ceux qui ont un salaire et qui à ce titre bénéficient de la protection légale. Sont explicitement exclus managers, journalistes, travailleurs domestiques, athlètes et tous ceux qui effectuent un travail spécial requérant une législation séparée (comme partout ailleurs)
art 5	droits fondamentaux des travailleurs	droits collectifs du travail ; négociation collective ; sécurité sociale et pensions ; santé et sécurité au travail ; retraite ; participation à la prévention et au règlement des conflits ; droit de grève
art.6	autres droits, moins importants	droit effectif au travail ; respect de l'intégrité morale et physique ; protection contre toute forme de discrimination dans l'accès à l'emploi, à l'exception de celles basées sur le mérite et compétences personnelles ; formation professionnelle ; salaire régulier ; et tous les droits relevant du contrat de travail.
Art. 7	devoirs des travailleurs*	accomplir les obligations inscrites dans le contrat avec diligence et continuité ; contribuer à améliorer l'organisation et la production de l'entreprise ; obéir aux instructions dans les limites normales du pouvoir de la maîtrise ; respecter « the provision in force » tant que la santé et la sécurité ne sont pas mises en causes ; participer aux activités de formation ; ne pas divulguer les informations confidentielles etc ;
Art. 31 à 56	Autres dispositions contribuant à définir la relation de travail en termes de flexibilité-rigidité.	Régulation du temps de travail très protectrice, proche de celle de la plupart des pays de l'UE, harmonisée par la Directive n°93/104 telle que modifiée par la directive 2000/34 ; le temps légal de travail est de 40 heures par semaine, au moins 5 jours et la durée de la journée de travail ne peut excéder 12 heures. Heures supplémentaires peuvent être demandées si elles répondent à un « besoin absolu du service » et sont « absolument exceptionnelles ». Un paiement extra est dû dans ce cas. Un jour de repos obligatoire, le vendredi et 2,5 jours de congé payé par mois travaillé.
Art. 11	CDD et temps partiel	sauf dispositions spécifiées au moment de l'écriture du contrat, le contrat de travail est considéré comme à durée indéterminée. La loi n'autorise les parties à stipuler un CDD que dans les cas définis par art.12
Art. 12	Cas autorisant les CDD	contrat pour un travail non renouvelable, remplacement d'un travailleur absent devant reprendre son poste ; pour un travail saisonnier ; dans autres cas où c'est lié à la nature du travail. Dans tous ces cas, cela doit être spécifié clairement ds le contrat, notamment la durée exacte. Cela autorise les inspecteurs du travail à vérifier (art 12-bis). En cas de violation, le contrat devient CDI.
art. 13 Loi 97-473	considérations spécifiques pour temps partiel	Contrats à temps partiel autorisés mais pas moins de la moitié de la durée normale légale de la semaine de travail, au moins 20 jours. Des contrats similaires sont autorisés lorsque le montant de travail disponible n'est pas assez important pour permettre de recruter avec un contrat de plein temps. La loi ne dit rien sur la transformation d'un contrat de temps plein en un contrat de temps partiel, la décision est laissée aux parties contractantes, ce qui laisse le champ libre à l'employeur pour obtenir le consentement du travailleur sous la menace du licenciement. Tant pour la gestion que l'articulation du temps partiel le long de la journée, la semaine ou l'année, la loi régit le minimum et laisse le champ libre à la négociation collective pour toutes les décision.

**certaines de ces dispositions figuraient dans la constitution de 1976.*
Source: d'après Boni (2009).

Mis à part des dispositions assez flexibles concernant le licenciement, le droit du travail algérien reste très protecteur, notamment en ce qui concerne la durée du travail, ce qui pourrait être un des éléments explicatifs de l'ampleur du secteur informel. Pour contourner la rigidité du droit du travail, les autorités ont recours à des contrats de main d'œuvre avec des entreprises étrangères important leur propre main d'œuvre à laquelle ne s'applique pas la législation locale en créant de surcroît un biais favorable à l'importation de main d'œuvre étrangère au détriment de la main d'œuvre locale.

2.1.2 Institutions intermédiaires, principaux acteurs impliqués dans les négociations collectives

Contrairement à ce qu'écrit Boni (2009), l'Algérie a bien une législation sur les agences d'emploi, depuis la promulgation de la loi n°04-19 du 25 décembre 2004 relative au placement des travailleurs et au contrôle de l'emploi qui vise à mettre la législation en conformité avec la convention 181 de l'OIT sur les agences d'emploi privées ratifiée par l'Algérie en 2006. Si l'on prend la notion d'intermédiation sur le marché du travail au sens large (Barbier, 2006), incluant tant les fonctions de placement, d'information, d'indemnisation du chômage que de gestion des programmes actifs, on constate qu'il y a en Algérie une multiplicité d'intermédiaires.

Tableau 15 : Répartition des fonctions d'intermédiation sur le marché du travail

Fonctions	**Intermédiaires**[77]
Placement	ANEM, CNAC, agences privées
Information sur le marché du travail	ANEM, ONS, Observatoire[78]*
Indemnisation du chômage	CNAC
Gestion des programmes actifs	CNAC, ADS, ANSEJ, ANGEM[79]

Dans cette multiplicité de structures qui révèle une fragmentation ou une segmentation de l'espace d'intermédiation, c'est le secteur public qui prédomine. L'intermédiation n'a que récemment été ouverte au secteur privé (loi n°04-19 du 25 décembre 2004, mise ne œuvre en décembre 2005). Mais cette ouverture n'est qu'apparente. En droit, l'ANEM a toujours le monopole du placement. La nouvelle loi renforce surtout les attributions de l'ANEM – érigée en EPGS (Etablissement Public à Gestion Spécifique) - en matière de régulation du marché du travail et de contrôle de l'emploi, et n'accorde qu'un rôle secondaire et fortement encadré aux agences privées de placement. Celles-ci devront, préalablement à leur entrée en activité, obtenir un agrément du Ministère chargé de l'emploi, après avis d'une commission interministérielle, puis passer convention avec l'ANEM et souscrire à un cahier des charges. Cette procédure vise à mettre fin à la prolifération d'intermédiaires informels sur le marché du travail. Selon le ministre du travail, cette loi « est venue combler le vide juridique prévalant en matière de sanctions qui étaient régies par le Décret n°63-153 du 25 avril 1963 relatif au contrôle de l'emploi et au placement des travailleurs, devenu totalement obsolète et inadapté ». Par son caractère bureaucratique, elle risque d'augmenter les entraves à la flexibilité du marché du travail[80].

Renforcée dans son monopole du placement, l'ANEM ne dispose pourtant pas des moyens de l'assumer. Selon Barbier (2006), les mesures successives prises par les autorités ont vidé de son contenu cette situation de monopole *de jure* de telle sorte que, dans les faits, l'ANEM ne peut exercer sa fonction de placement. Ainsi, la gestion des programmes actifs permettant d'intervenir sur le marché du travail a été pour l'essentiels attribuée à la CNAC - qui, tout en indemnisant les chômeurs, assure également de fait leur placement et a élaboré pour cela des prestations spécifiques d'assistance à la recherche d'emploi - et surtout à l'ADS, organisme public spécialisé dans le domaine social, auquel ces programmes, initialement conçus comme mesures d'accompagnement du PAS, ont tout naturellement été confiés. L'ADS a en charge les programmes de Travaux Public, le programme CPE de formation-insertion et une partie des programmes d'aide à la création d'activités avec la gestion du micro-crédit (en 2004, celle-ci fut transférée l'ANGEM, spécialement créée pour cela). Le programme d'aide à la création d'entreprises fut attribué à un autre organisme, l'ANSEJ. Enfin, un nouveau dispositif ciblant les 35-50 ans a été attribué à la CNAC, qui dispose de ressources financières et de compétences. L'éclatement de la fonction d'intermédiation entre différents opérateurs génère des surcoûts de gestion et crééе les difficultés de coordination. De plus, si tous les intermédiaires sont publics, ils ne sont pas placés sous une même tutelle

77 Agence Nationale de l'Emploi et de la Main d'œuvre (ANEM), Caisse Nationale d'Assurance Chômage (CNAC), Agence de Développement Social (ADS), Agence Nationale de Soutien à l'Emploi des Jeunes (ANSEJ), Agence Nationale de Gestion du Micro-crédit (ANGEM)

78 L'Observatoire du marché du travail, créé en 2004 a pour fonctions l'animation et la coordination de la mise en œuvre des politiques du marché du travail. Nous n'avons trouvé aucun bilan de son activité.

79 Agence Nationale de Gestion du Micro-crédit (ANGEM)

80 Voir l'enquête de Granovetter (1973) sur l'importance du recrutement par des réseaux informels sur le marché du travail aux Etat-Unis.

ministérielle. Barbier (2006) note que « la politique de l'emploi est davantage pilotée par des ministères à connotation sociale que par celui de l'emploi ».

En termes d'effectifs, la situation des principaux intermédiaires du marché du travail est paradoxale. L'ANEM, faiblement dotée, dispose d'un important réseau d'agences locales (165) et régionales (11), héritage de l'histoire qui lui assure une présence territoriale unique. La caisse d'Assurance chômage (CNAC), dont l'effectif est le plus élevé, est active mais cette activité ne concerne qu'un nombre relativement faible de chômeurs. Si on rapporte ses effectifs aux quelques 180 000 allocataires du régime d'assurance chômage, il apparaît que chaque agent de la CNAC a en charge 164 chômeurs, ratio qui se rapproche des standards européens. Enfin l'ADS, qui gère la plupart des programmes actifs du marché du travail, dispose d'un effectif relativement faible et sous-traite son activité au milieu associatif et aux municipalités.

Le gouvernement a décidé de réhabiliter l'ANEM, suite à une proposition de la Tripartite, instance consultative composée de représentants du gouvernement, des employeurs et des travailleurs. Ce souci de rééquilibrer le paysage institutionnel de l'intermédiation en faveur de l'opérateur historique dans le domaine de l'emploi pourrait aussi traduire une inclinaison à retourner au schéma institutionnel d'avant les réformes.

Les dispositifs relatifs à la création d'emploi auraient mobilisé près de 100 milliards de DA entre 2001-05 (MAEP, 2007)[81]. Selon le CNES (2006) leur efficacité pourrait nettement être améliorée si les collectivités locales prenaient plus de responsabilité dans leur gestion et leur mise en œuvre et surtout si un mécanisme de suivi-évaluation était mis en place.

Participation des syndicats à l'intermédiation sur le marché du travail.

La participation des organisations syndicales à la vie économique et sociale du pays est consignée dans l'article 39 de la loi 90-14 du 2 juin 1990: "en proportion de leur représentativité, les unions, fédérations et confédérations de travailleurs salariés et d'employeurs les plus représentatives à l'échelle nationale sont consultées dans les domaines d'activité qui les concernent lors de l'élaboration des plans nationaux de développement économique et social et en matière d'évaluation et d'enrichissement de la législation et de la réglementation du travail ; négocient les conventions ou accords collectifs qui les concernent; sont représentées aux conseils d'administration des organismes de sécurité sociale, au conseil paritaire de la fonction publique et à la commission nationale d'arbitrage instituée au titre de la loi 90-02 du 6 février 1990 relative à la prévention et au règlement des conflits de travail et à l'exercice du droit de grève".

En Algérie, il est possible de créer librement des organisations syndicales depuis la Constitution de 1989 qui consacre le pluralisme syndical. Auparavant, la centrale syndicale historique, UGTA (Union Générale des Travailleurs Algériens), avait le monopole de la représentation des travailleurs. Depuis cette date, quelque 53 syndicats dits « autonomes », ont été créés dans le cadre des lois 90-14 et 90-02 issues de la Constitution de 1989 parmi lesquels 13 ont réussi à se maintenir. Certains de ces syndicats, comme le CNES (Conseil National des Enseignants du Supérieur), ont émergé dès 1989. Cependant, depuis leur création, aucun syndicat autonome ne participe à une commission ou conseil d'administration d'un organisme social. Pour justifier cela, les autorités s'appuient sur l'argument de la représentativité. Pour être représentatif, un syndicat doit regrouper au moins 20% de l'effectif des salariés[82]. Les organisations syndicales constituées six mois avant la promulgation de la loi dérogent à cette obligation de représentativité (article 34). La seule organisation syndicale concernée est l'UGTA.

81 Mécanisme d'Evaluation par les Pairs mis en place par le NEPAD.

82 loi 90/14 et circulaire n° 009 du 19 mai 1997 articles 35 et 36, 37.

Ainsi, seule l'UGTA est autorisée à siéger dans la Tripartite tandis que le patronat y est représenté par plusieurs organisations. Les rencontres dites bipartites ont également réuni le Gouvernement et la seule UGTA.

Le Pacte National Economique et Social est un accord signé le 30 septembre 2006 entre le gouvernement, des organisations patronales et l'UGTA. Il a une durée de 4 ans renouvelable, et «reste ouvert aux autres partenaires économiques et sociaux». Il engage toutes les parties prenantes du développement économique et social de l'Algérie : pouvoirs publics, travailleurs (à travers l'UGTA) et employeurs. Il vise à « instaurer un climat social serein et stable » pour la réalisation d'une douzaine d'objectifs généraux portant sur la croissance et le développement durable, l'investissement dans les infrastructures, l'après-pétrole, la modernisation de l'agriculture, les capacités concurrentielles des entreprises, l'amélioration du pouvoir d'achat, la réforme des institutions, mais le seul l'objectif à être formulé de manière précise est la réduction du taux de chômage à 10% à l'horizon 2010. Pour atteindre ces objectifs, chacune des parties du pacte s'engage à maintenir le partenariat et le dialogue. Le PNES est assorti d'un mécanisme de mise en œuvre et d'évaluation fonctionnant sur la base de réunions tripartites périodiques regroupant gouvernement, organisations patronales signataires et UGTA. Un rapport annuel doit être établi par le comité national de suivi tripartite créé à cet effet. Concernant les modalités de négociations salariales, elles sont renvoyées au niveau des branches, tant pour le secteur privé que pour le secteur public. Selon le MEAP (2007), ce pacte, se veut une « percée significative dans la construction de la cohésion et de la concorde nationale, ainsi que de la paix sociale autour des mêmes idéaux sociaux consensuellement partagés. (..) Cet instrument constitue un espace de concertation privilégié qui est de nature à prévenir ou à gérer les conflits sociaux, notamment dans le monde du travail ». Cependant, la non participation des syndicats autonomes réduit le champ de cette concertation et consensus.

2.1.3 Formation des salaires et coûts du travail

Le niveau des salaires est déterminé par les négociations collectives (de branche et/ou d'entreprise), dans le cadre des règles fixant le salaire minimum établies par la convention internationale de l'OIT ratifiée par l'Algérie. On ne dispose pas de statistiques récentes sur les salaires. Cependant, pour la période de 1993 à 1996, l'Algérie a connu un effondrement des salaires réels, qui ont chuté à un rythme annuel de 10% durant ces trois années.

Observant un niveau moyen des salaires relativement faible et une croissance des salaires plutôt modérée, Ecotechnics (2006), prédit que « la persistance d'un taux de chômage élevé, sans doute plus important que celui affiché par l'ONS, ne devrait pas aller sans conséquence sur l'évolution des salaires ». La tripartite de septembre 2006 s'était engagée sur une augmentation des salaires de 10 à 20% pour les salariés du secteur privé et de 20 à 25% pour les salariés des EPE (Entreprises publiques économiques). « En pratique ceci est difficile à appliquer car pour que ces augmentations soient applicables il faut d'abord que l'entreprise concernée soit couverte par une convention de branche et, ensuite l'accord précise que les augmentations doivent être modulées par la situation de l'entreprise. Or le secteur privé n'est pas couvert par les conventions de branche et la majorité des entreprises publiques sont dans une mauvaise situation financière. Au total ce type d'accord apparaîtra très peu réaliste tant que le secteur privé ne sera pas couvert par les conventions de branches et tant que le secteur public pâtira d'une aussi mauvaise situation financière. Le fait que les conventions de branches ne touchent pas le secteur privé est significatif de la difficulté à extirper le secteur privé du comportement qu'on observe dans l'informel. Du reste les associations professionnelles apparaissent beaucoup plus comme des groupements de pression que comme des instruments de structuration de l'environnement des entreprises ». (Ecotechnics, 2006).

Régulation et conformité du salaire minimum

Le SNMG (Salaire National Minimum Garanti) reste l'unique instrument de régulation salariale. Il a également une fonction sociale car de nombreux régimes sont indexés sur son niveau (Muzette, 2003).

La croissance annuelle moyenne du salaire minimum est négative en termes réels sur la période 1980-1989 avec un taux moyen de -3,9%. Par contre, au cours de la décennie 90, sur la période 1990-2001, le SNMG réel a connu une croissance moyenne de 4,9% l'an. Par ailleurs, la part des travailleurs payés au SNMG dans l'ensemble des salariés est passée de 11% à 19,3% entre 1995 et 2000, ce qui révèle de ce point de vue une précarisation des salariés (Muzette, 2003).

Par rapport au salaire moyen dans le secteur public national, le SNMG représente 40,8% en 2006 alors qu'il n'en représentait que 28,6% en 1996[83]. Il ne semble donc pas qu'il existe une relation stable entre l'évolution du SNMG et celle du salaire moyen dans l'économie. En tout état de cause, la présence d'un secteur informel important réduit l'efficacité de toute procédure formelle de régulation, en particulier l'efficacité du SNMG à constituer un seuil plancher de rémunération salariale tout autant que d'être un instrument réel d'indexation des salaires.

Niveau et tendances des coûts non salariaux du travail

Parmi les coûts non salariaux du travail, il y a des coûts indirects tels que la formation, les congés exceptionnels, le transport, que l'employeur doit consentir aux travailleurs déclarés.

En matière de protection sociale, les travailleurs ainsi que les personnes à leur charge bénéficient d'une couverture formelle quasi-complète. Sont couverts les risques associés à la retraite, la maladie, la maternité, l'invalidité, les décès, les accidents de travail, les maladies professionnelles, le chômage (MAEP, 2007).

Le taux des cotisations (34%) est très élevé en comparaison avec ceux d'autres pays comme le Maroc (20%) et la Tunisie (24%). Il est comparable à celui du Portugal (35%) (Muzette, 2003). Il se répartit entre 25,5% pour la quote-part des employeurs et 9% pour celle des salariés. Pour la Banque mondiale, cette charge décourage l'embauche formelle pour pousser les employeurs soit à ne pas déclarer leurs employés, soit à adopter des techniques de production intensives en capital (World Bank 2003). Ce coût de l'emploi est également trop élevé pour attirer les IDE si l'on tient par ailleurs compte de la faible productivité du travail

Cependant, là encore, les pratiques informelles à grande échelle créent un gap entre les objectifs sur le papier de ces procédures et leur effectivité. Ainsi, une grande partie des travailleurs ne bénéficient pas de la sécurité sociale. En 2003, des inspections opérées par la CNAS sur 5 129 lieux de travail ont révélé que 35% des effectifs n'étaient pas déclarés à la sécurité sociale (MAEP, 2007). D'un autre côté, la lourdeur des procédures bureaucratiques, avec un consentement tacite de l'Etat, découragent les travailleurs à réclamer l'accès aux bénéfices de la couverture sociale.

Comme dans d'autres pays ayant hérité du système français (Maroc, Tunisie, Liban), l'Algérie dispose d'un système d'allocations familiales, plafonnées toutefois à partir du troisième enfant. Le système de retraite est obligatoire, partiellement contributif et opérant par répartition, avec des plans prédéterminés (*definite benefit plans*). La Banque mondiale a émis un jugement très négatif sur les systèmes de pension existants dans les pays du MENA. Mal conçues, inefficaces, les réserves sont mal gérées et les services ne sont souvent pas distribués comme ils le devraient. Le rendement des investissements des fonds est bas, voire négatif. La raison en est que les réserves des systèmes de pension sont utilisées pour subventionner d'autres programmes gouvernementaux, dont des programmes d'assistance en Algérie (Destremau, 2004).

83 Pour 2006, il s'agit du salaire moyen dans le secteur public national tel que publié par la CNAS.

2.2 Salaires et revenu national

Les salaires, le revenu national par tête, ou plus précisément leur différentiel, constituent dans l'approche traditionnelle de l'émigration de puissants facteurs d'incitation à la migration. Si le jeune *i* est supposé faire face à un salaire w_0 dans son pays d'origine et à un salaire w_1 s'il émigre et si *C* est le coût de la mobilité internationale -qui peut être supposé fixe, proportionnel au salaire w_0 (Borjas 1987) ou décroissant avec le niveau d'éducation (Chiquiar et Hanson 2002)-, le taux d'émigration sera alors égal à la probabilité que $[(w]]_1 - w_0 - C)$ soit positif.

On voit que le taux d'émigration est négativement relié au revenu moyen du pays d'origine, positivement relié au revenu moyen du pays d'accueil, négativement relié au coût de la mobilité dans ses aspects monétaires, humains et sociaux. Ainsi, l'examen de l'évolution des revenus en Algérie (SNMG, salaire moyen ou revenu national par habitant) et leur comparaison avec ceux des pays d'accueil potentiels (UE-15 ou France) nous renseignent en premier lieu sur l'*outcome* du marché du travail en Algérie et incidemment sur certains facteurs déterminant le choix de l'émigration.

2.2.1 Evolution comparée des niveaux de salaires et de revenus

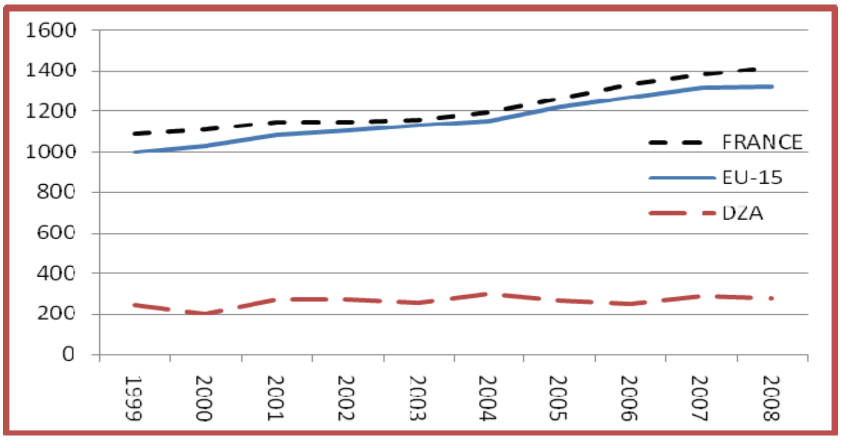
Tableau 16 : Evolution du SNMG en Algérie 1990-2007 (DA)

Année	**1990**	**1991**	**1991**	**1992**	**1994**	**1997**
SNMG	1 000	1 800	2 000	2 500	4 000	4 800
Année	**1998**	**1998**	**2001**	**2004**	**2007**	
SNMG	5 400	6 000	8 000	10 000	12 000	

Source ONS

Afin de procéder à des comparaisons internationales, le SNMG a été converti pour chaque année en dollars PPA en utilisant le taux de conversion du PIB. La même conversion a été opérée pour chaque pays de l'Union européenne (UE-15) séparément pour établir ensuite le SMIG moyen de l'ensemble UE-15. On a également reproduit le salaire minimum en PPA en France du fait de l'importance de ce pays comme pays d'accueil de l'émigration algérienne.

Figure 4 : Evolution comparée du salaire minimum garanti en $ PPP entre l'Algérie, l'UE-15 et la France



Source : ONS – Eurostat. Le taux de conversion est celui du GDP

On n'observe pas de convergence particulière. Bien plus, l'écart du SMIG entre l'Algérie et l'UE ou la France s'amplifie passant de 800 $ en 1997 à 1100$ en 2008. Ce facteur devrait inciter, toute chose égale par ailleurs, à un accroissement du taux d'émigration vers ces pays. On peut également considérer le salaire moyen comme autre indicateur de revenu et comparer son évolution à celle des pays potentiels d'accueil. Le tableau ci-dessous montre l'évolution du salaire moyen pour l'Algérie, la France et l'ensemble des pays de l'UE-15 pour lesquels les données sont disponibles.

Tableau 17 : Evolution du salaire moyen annuel en dollars PPA

	1996	2006
DZA en LCU (DA)	168 072	262 505
DZA ($PPA)	7 226	6 319
UE-15 ($PPA)	24 417	34 508
France ($PPA)	25 899	34 502

Source : Eurostat, ONS (1996) et CNAS (2006)

Ainsi, alors que le revenu moyen en UE-15 connaît un accroissement annuel moyen de près 3% l'an, le salaire moyen en Algérie a connu une augmentation en DA courants mais une diminution, en dollar US en parité du pouvoir d'achat, entre 1996 et 2006 de -1 ,7% l'an en moyenne sur la période[84]. Manifestement, ces deux indicateurs, à l'instar de l'évolution du SMIG, ne nous permettent pas de conclure à une convergence de revenus entre l'Algérie et l'Union européenne. Le salaire moyen en Algérie en PPA était environ trois fois inférieur à celui de la France en 1996 ; il est de cinq fois inférieur en 2006. On peut s'interroger sur la nature des secteurs qui tirent l'évolution des salaires en Algérie.

Tableau 18 : Evolution du salaire nominal par branches d'activité

	1996 (ONS)	2006 (CNAS)	TCAM
Hydrocarbures et TP Pétroliers	22911	51021	8,34%
Industrie	13009	22240	5,51%
B.T.P. (Non Pétroliers)	11173	15318	3,21%
Transports	15315	28421	6,38%
Commerce	13824	27160	6,99%
Services	16665	20512	2,10%
Ensemble	14006	21875	4,56%

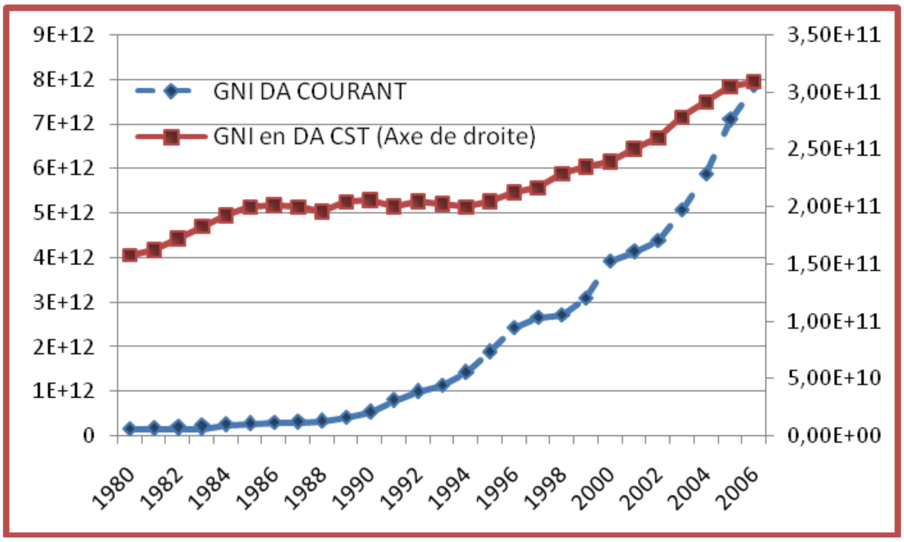
Source ONS pour 1996 et CNAS pour 2006

84 Il faut toutefois prendre avec précaution les comparaisons intertemporelles du fait de l'hétérogénéité des sources : ONS pour 1996 et CNAS pour 2006

On constate que ce sont surtout les secteurs des BTP et des services qui ont connu l'évolution la plus lente, inférieure à la moyenne des branches considérées. Or ils représentent près de 75% de l'emploi total de l'ensemble des branches considérées et, en conséquence, tirent à la baisse l'évolution du salaire moyen sur la période.

Enfin, le revenu national peut également être utilisé aux fins de comparaison entre l'Algérie et les pays d'accueil. Pour l'homogénéisation des séries, on a utilisé la même source de données (WDI 2008). Le tableau suivant montre l'évolution dans le temps du Revenu National Brut (GNI) en Algérie en prix courants et en prix constants (en utilisant le déflateur du PIB).

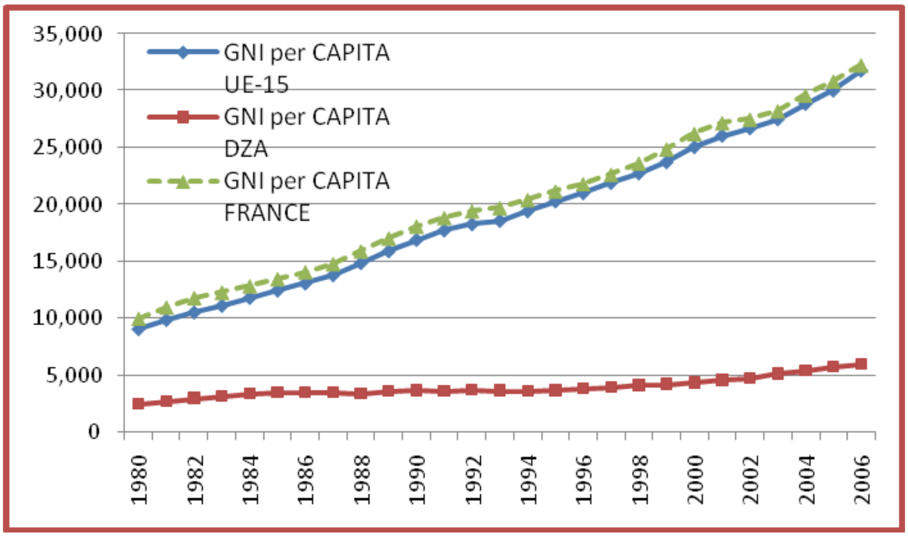
Figure 5 : Evolution du GNI en Algérie en DA courants et constants 1980



Source WDI-WB 2008. Pour le GNI à prix constants, le déflateur est celui du GDP

Dans la même perspective, on peut comparer l'évolution du GNI per capita de l'Algérie et des pays ciblés par l'émigration.

Figure 6 : Evolution comparée du GNI per Capita en $ PPP DZA-UE-15



Source : WDI –WB 2008

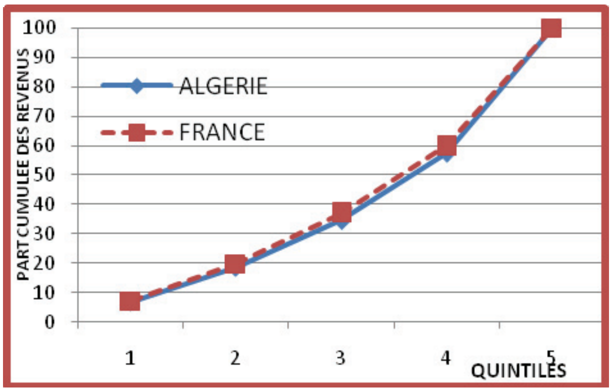
La même divergence de revenu peut être observée entre l'Algérie et la moyenne des pays de l'UE ainsi qu'entre l'Algérie et la France. L'ensemble de ces indicateurs confirme que l'Algérie offre des niveaux de revenus –en tant que *push factors*- potentiellement favorables à un développement de l'émigration vers les pays de l'UE.

2.2.2 Evolution comparée de la structure des revenus

Les inégalités de revenu dans le pays d'origine par rapport au pays d'accueil ont un effet non linéaire sur le taux d'émigration : si elles sont relativement faibles initialement, un accroissement accroît le taux d'émigration et ce, jusqu'à un seuil à partir duquel l'impact devient négatif (Chiquiar et Hanson 2002). Les figures ci-dessous présentent l'évolution de la distribution des revenus en Algérie entre 1988 et 1995 (courbes de Lorenz) ainsi qu'une comparaison avec l'économie française.

Figure 7 : Distribution comparée des revenus

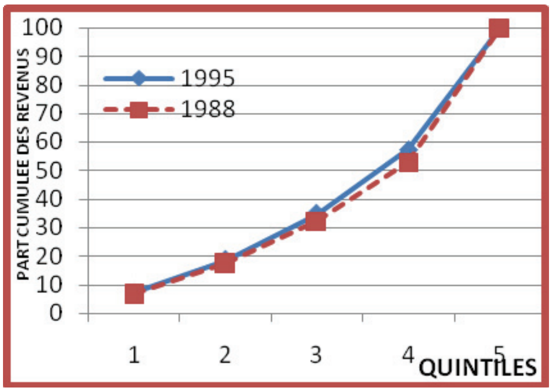
DZA-France 1995



Source d'après WDI-2008

Figure 8 : Evolution de la distribution des revenus

Algérie 1988-



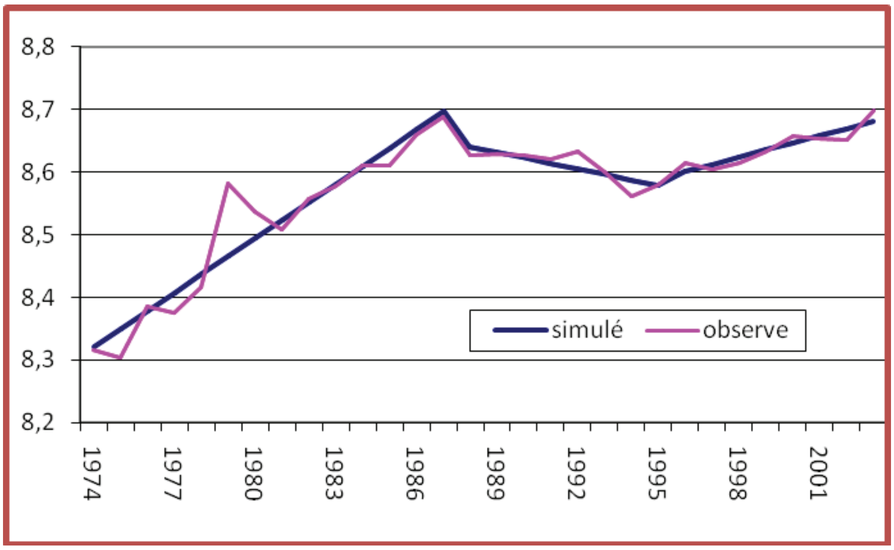
En 1995, le coefficient de GINI était de 0,33 en France et 0,35 en Algérie. Dix années plus tard, la répartition du revenu est devenue légèrement plus égalitaire en Algérie avec un indice de Gini de 0,32 (CENEAP) alors que ce coefficient s'élevait à 0,36 en France (INSEE). Partant d'une situation initiale (1995) relativement égalitaire, l'évolution de la répartition des revenus en Algérie vers une plus grande égalité est un facteur potentiel favorable à une augmentation du taux d'émigration.

SECTION 3 : LA PERFORMANCE DU MARCHÉ DE TRAVAIL: QUESTIONS ET DÉFIS

3.1 Chômage : situation et tendances

L'économie algérienne a subi au cours des années 80 des chocs externes défavorables que sa structure d'économie dépendante des ressources primaires ne lui a pas permis d'absorber[85]. L'endettement externe a été le mode de financement privilégié des investissements exceptionnels réalisés au cours des années 70. Sans diversification économique qui lui aurait permis de rembourser ses emprunts externes, l'Algérie s'est trouvée en situation d'illiquidité sinon d'insolvabilité dès la chute de ses recettes d'hydrocarbures. Le contre choc pétrolier de 1986 marque clairement une rupture dans le *trend* de croissance accélérée que l'Algérie avait connu durant sa période d'économie administrée[86].

Figure 9 : Evolution du (log) PIB per capita en Algérie



Source calculs des auteurs d'après Penn World Tables (2004)

Cet effondrement de la croissance (*growth collapse*), qui a duré 15 ans[87] a entraîné un profond déséquilibre du marché du travail. Le chômage a connu une hausse brutale et massive, son taux passe en deux ans (1985-1987) de 9,7% à 21,4%.

Durant près de quinze ans, le taux de chômage a été constamment au dessus de 20% avec un pic de 29,2% en 1999 faisant de l'Algérie, parmi les pays à revenus similaires, l'une des économies au monde les plus touchée par le chômage. Ce taux a été par la suite réduit de moitié entre 2000 et 2005, l'objectif déclaré aujourd'hui étant de l'abaisser à un niveau inférieur à 10%.

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85 Même parmi les pays exportateurs d'hydrocarbures, l'Algérie reste l'une des économies dont les exportations sont le plus concentrées sur les ressources énergétiques.

86 Les deux dates de rupture du log du PIB per capita, dans la figure, ont été statistiquement déterminées par le test de Baï et Perron. Cf Bouklia-Hassane : 'Abondance des ressources naturelles et épisodes de croissance accélérée : une analyse par les modèles de durée' (miméo).

87 Comme le montre la figure, ce n'est qu'en 2001 que le PIB per capita retrouve son niveau de 1986.

Tableau 19 : Evolution du taux de chômage

Année	1966	1978	1982	1983	1984	1985	1987	1989	1990
Taux de chômage (en%)	32,9	22	16,3	13,1	8,7	9,7	21,4	18,1	19,7
Année	**1991**	**1992**	**1993**	**1994**	**1995**	**1996**	**1997**	**1998**	**1999**
Taux de chômage (en%)	21,2	23,8	23,2	24,4	28,1	28	26,4	28	29,2
Année	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
Taux de chômage (en%)	28,9	27,3	25,9	23,7	17,7	15,3	12,3	13,8	11,3

Source : ONS

La définition par l'ONS de la population active, occupée et au chômage

L'évaluation de la population active, occupée et en chômage par l'ONS se fait en trois étapes. La première, sur la base de la déclaration spontanée de la personne, permet d'avoir une première évaluation de la population occupée et celle sans travail et déclarant être à la recherche d'un emploi.
Une deuxième étape consiste à demander à l'ensemble des personnes ayant déclaré être en situation autre qu'occupé s'ils n'ont pas exercé une activité marchande pendant au moins une heure durant la semaine de référence. La population occupée sera corrigée à la hausse par le nombre de personnes qui répondent oui tandis que la population au chômage sera réduite du même nombre.
Une troisième étape consiste à demander aux personnes déclarant n'avoir pas exercé d'activité marchande durant la semaine de référence s'ils cherchent effectivement un emploi. Cette étape permet de corriger le nombre de chômeur en en soustrayant les personnes qui déclarent ne pas être à la recherche d'emplois et qi seront considérés comme inactifs. Dans cette troisième étape, selon le BIT, les personnes qui doivent être considérées comme actives doivent être à la recherche d'u emploi et qui ont entamé des démarches. Cela conduirait à une diminution du nombre de chômeurs et de la population active. Néanmoins, compte tenu de la faiblesse des institutions d'accompagnement dans la recherche d'emplois, la condition de recherche effective d'un emploi n'est pas requise.
L'ONS réalise tous les ans une enquête. Celle-ci a été interrompue au cours de période 1998-2000 et en 2002. L'ONS ne réalise pas encore d'enquêtes trimestrielles. Les résultats des enquêtes ne vont pas sans poser parfois problème d'abord en eux-mêmes (population active en 2007 et emplois sur la période récente) puis par rapport à d'autres sources de données nationales (Plan).
Les publications annuelles du FMI sur l'emploi reprennent les données du Plan.
L'emploi informel ne semble pas encore une catégorie clairement déterminée. Le Plan l'évoque en termes de Formes Particulières d'Emploi (FPE), l'ONS souvent ne le distingue pas dans la répartition sectorielle de l'emploi tandis que le FMI, reprenant l'estimation du Plan, parle de Work at home et relie encore l'emploi informel au Ramadhan.

Face à la compression des effectifs (perte de 400.000 emplois du secteur public), les pouvoirs publics ont mis en œuvre une politique d'accompagnement sous forme d'assurance chômage. La Caisse de chômage (CNAN) est financée par une taxe de 1,75 % sur le salaire imposable (répartie à hauteur de 1,25 % à la charge de l'entreprise et de 0,5 % à la charge du salarié) et de droits d'ouverture (à hauteur de 80 % du salaire par mois par année d'ancienneté avec un maximum de 12 mois) versés par l'entreprise à la Caisse d'assurance pour tout travailleur licencié.

Par ailleurs, pour que cette politique ne dissuade le bénéficiaire de rechercher activement un emploi, les indemnités versées au travailleur licencié sont dégressives : de 100 % du salaire de référence durant le premier trimestre, elle passe à successivement 80 %, 60 % et 50 % durant les trois trimestres suivants (Bouklia-Hassane, Talahite 2008).

En fait, l'institution de l'assurance chômage a surtout bénéficié aux travailleurs licenciés du secteur public. Elle serait ainsi beaucoup plus une approche tendant, par un schéma de compensation, à réduire la résistance des travailleurs à la compression des effectifs, à la restructuration et à la privatisation des entreprises publiques.

Parmi les textes régissant l'assurance sociale, la retraite, les accidents de travail et maladies professionnelles ainsi que l'assurance chômage figurent:

- Le décret législatif n° 94-11 du 26 mai 1994 instituant l'assurance chômage
- Le décret exécutif n°94-189 du 6 juillet 1994 fixant la durée de prise en charge et les modalités de calcul de l'indemnité de l'assurance chômage
- La Loi n°98-07 du 2 août 1998 modifiant et complétant le décret législatif n°94-11 du 26 mai 1994

L'importance du chômage au cours des années 80 va enclencher une dynamique nouvelle avec l'apparition puis l'expansion d'un secteur informel qui va se développer en marge de toutes les règles institutionnelles organisant le fonctionnement du marché du travail.

3.2 Le secteur informel

Bien qu'un certain nombre de travaux existe sur le secteur informel en Algérie[88], peu d'entre eux ont été consacrés à son estimation. Il n'y pas eu à notre connaissance d'enquête pouvant servir de base à son évaluation.

La relation entre le taux de chômage et la taille du secteur informel

Nous avons soutenu (Bouklia-Hassane et Talahite, 2008) que la taille du secteur informel est en relation positive avec l'intensité du chômage. L'extension du chômage alimente une 'armée de réserve', un prolétariat urbain prêt à accepter les conditions de précarité de l'emploi informel et l'absence de règles institutionnelles. Pour le montrer, on peut s'inspirer du modèle urbain-rural de Harris-Todaro et supposer que le marché du travail informel fonctionne de façon concurrentielle avec des salaires fixés au coût marginal. Puisque les salaires sont parfaitement flexibles, deux questions peuvent être posées : (i) Quelle est la relation entre le taux de chômage et la taille du secteur informel ? (ii) Pourquoi l'informel, source de revenu après tout, n'absorbe-t-il pas tout le chômage existant ?

L'idée de base est que le jeune chômeur arbitre entre travailler dans le secteur informel ou chercher un emploi tout en restant chômeur en comparant le salaire informel ($S_I INF$) avec le *revenu espéré* dans le secteur formel. L'espérance de ce revenu est le SMIG pondéré par la probabilité de trouver un emploi (1-Txchom). En partant d'une situation d'équilibre, si le taux de chômage augmente, le revenu formel espéré diminue, incitant les jeunes chômeurs à préférer le travail informel à la recherche active d'un emploi formel. Cette offre supplémentaire de travail informel aura pour effet de diminuer le salaire S_{INF} dans le secteur informel et l'équilibre se rétablit à un niveau de taux de chômage plus élevé et un salaire informel plus bas.

On comprend alors que, malgré sa flexibilité, le secteur informel n'absorbe pas nécessairement tout le chômage existant. En effet, le jeune, à l'équilibre, sera indifférent entre le travail informel et la recherche d'emploi formel de sorte que :

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88 Voir notamment Charmes, Muzette (2006), Adair (2002).

$$S_{INF} = Smig(1 - Txchom)$$

Pour un taux de chômage et un SMIG donnés, cette relation détermine le salaire informel, l'offre de travail informel[89] et, partant, le partage de la population active – non employée dans le secteur formel - entre le travail informel et le chômage avec la recherche active d'emploi formel.

L'évolution du secteur informel

Il n'est pas aisé dans la pratique d'établir une distinction précise entre le travail formel et informel. Certains auteurs relient l'informel à la précarité de l'emploi, d'autres à la taille de l'entreprise (moins de 9 employés), à l'affiliation à la Caisse de sécurité sociale etc. On se réfère dans ce qui suit pour évaluer l'emploi informel aux emplois qualifiés de 'non structurés' au sens du Plan algérien. En fait, il n'y a pas d'harmonisation dans la nomenclature. Les emplois non structurés sont également appelés Formes Particulières d'Emplois (FPE), 'fourre-tout' qui semble désigner à la fois l'emploi informel ainsi que les dispositifs publics d'emplois. Le FMI reprend à son compte ces données en les désignant, de façon étonnante, de '*Work at home*'. L'emploi structuré sera alors la différence entre l'emploi total et les FPE. Plus précisément, les FPE sont la différence entre l'emploi total et les emplois structurés.

Tableau 20 : Evolution de l'emploi informel

	1996	**1997**	**1998**	**1999**	**2000**	**2001**
Emploi Informel/Emploi Total	17,5%	18,8%	18,9%	19,3%	20,2%	21,2%
Emploi Informel/Emploi Total Hors Administration	22,9%	24,7%	24,8%	25,3%	26,3%	27,2%
Emploi Informel/Emploi Total Hors Administration et Hors Agriculture	31,3%	33,3%	33,4%	33,9%	34,9%	36,7%
	2002	**2003**	**2004**	**2005**	**2006**	**2007**
Emploi Informel/Emploi Total	21,0%	21,1%	25,7%	26,8%	27,6%	27,0%
Emploi Informel/Emploi Total Hors Administration	26,9%	26,6%	31,7%	32,6%	33,3%	32,4%
Emploi Informel/Emploi Total Hors Administration et Hors Agriculture	36,6%	36,4%	42,1%	43,0%	43,8%	42,6%

Source : ONS – Délégué au Plan - FMI

Hors administration où, par nature, l'informel n'existe pas et hors agriculture où il est mal cerné, c'est-à-dire dans les secteurs de l'industrie, des BTP, du transport, commerce et services, le travail informel représente plus de 40% de l'emploi total. L'augmentation la plus importante est en 2004 où sa part s'accroît de près 6 points en une année et correspond à l'entrée de près de 500.000 travailleurs dans le secteur informel. Une grande partie de ces emplois est créée par les dispositifs institutionnels d'emplois. L'ampleur de ce phénomène nous permet de qualifier d'*informalisation institutionnelle* le caractère structurel de ces 'emplois d'attente de la croissance'.

L'un des aspects les plus importants de l'informalisation de l'économie est de rendre les procédures institutionnelles de régulation inopérationelles. Elle réduit l'effectivité des procédures de régulation en en faisant des 'procédures sur le papier' dont le seul effet est d'accroître '*the thickiness of the labor Code*' (Rama). Il en est ainsi du SMIG dans le secteur informel, de la protection sociale, du versement des indemnités de licenciement dans le secteur privé, de la syndicalisation etc. Plus important encore, l'extension du secteur informel, en favorisant un gap entre la régulation de juré et

89 On suppose que la demande de travail informel par les entreprises est exogène. Par ailleurs une hypothèse cruciale est que le SMIG soit supérieur au salaire dans le secteur informel. Enfin, on exclut la recherche de travail on-job.

de facto, réduit l'élasticité de l'emploi et des performances du marché du travail par rapport aux réformes des institutions de ce marché. Ces dernières à la limite deviennent inopérantes.

3.3 Immigration sur le marché du travail national: rôle et impact

3.3.1 Régulation de l'immigration de travail et politiques publiques

La régulation de l'immigration de travail en Algérie est encore largement un héritage du système d'économie administrée. Organisée collectivement dans un cadre défini par les autorités, elle laisse peu de place à l'initiative individuelle. Sur le plan juridique, elle est régie par des accords bilatéraux (tableau 21), établis notamment avec les pays frontaliers.

Tableau 21 : Accords spécifiques bilatéraux sur la circulation des personnes

Pays	Accords	Date	Contenu	Remarques
France	Accords d'Evian	1962	Libre circulation des personnes et des biens	Ces accords ont été vite dépassés
France	Accord sur la sécurité sociale	1981	Egalité de traitement des ressortissants de deux pays au regard de la législation des 2 pays en matière de sécurité sociale et de protection sociale	
Maroc	Convention d'établissement	1963 (JO n°31 17/04/1963	Libre accès des nationaux des 2 pays au territoire de l'un ou l'autre état, libre séjour et circulation y compris le droit de s'établir en tant que résident (art. 1)	La question de l'emploi est à peine évoquée (art. 5). Convention mise à mal par les conflits entre les deux pays (frontières, sahara occidental, terrorisme).
Tunisie	Convention d'établissement	26/07/1963	Libre circulation et séjour des ressortissants des deux pays. pour bénéficier des droits et libertés publiques sans discrimination avec les nationaux tunisiens, une immatriculation consulaire ainsi qu'une carte d'identité délivrée par les autorités tunisiennes	La question du travail n'est pas traitée de façon explicite par la convention ; il y est fait allusion par le biais des la garantie des droits économiques et l'exercice des professions réglementées
Tunisie	Accord sur la circulation des nationaux des 2 pays domiciliés dans la zone frontalière de 15 km.	15/08/1966	Facilités douanières et administratives ; autorisation de passage ou de parcours pour les propriétaires et leurs employés dont les biens sont coupés par la ligne frontière ou situés dans l'autre pays. Les « transfrontaliers » bénéficient d'une carte d'identité individuelle (carte de frontière) valable 2 ans renouvelable.	Des difficultés concernant le traitement des ressortissants algériens en Tunisie alors qu'ils avaient jusque là bénéficié d'une forme d'égalité de traitement avec les nationaux. Procès verbal en 1997 pour régler « questions équivoques
Libye	Convention	20/12/1987	Coopération dans le domaine du travail et de l'utilisation des ressources humaines	Pas de convention sur la frontière ni de disposition spécifique concernant la libre circulation des personnes, leur séjour, leur établissement et leur travail
Libye	Convention	?	Double imposition des revenus réalisés par les ressortissants de l'un ou l'autre état, activités salariales ou libérales	
UE	Accord d'association	2001 (ratifié en 2005)	Articles 67 à 76	

Source: d'après Kerdoun (2008).

Les étrangers qui résident ou transitent en Algérie sont régis par les conventions des Nations Unies relatives à la protection des migrants et des droits de l'homme ainsi que les conventions de l'OIT pour ce qui est du travail. Une législation spécifique (ordonnance de 1966) leur permet d'obtenir des titres de séjour temporaires. Les étrangers résidents qui accèdent au territoire national afin de s'établir pour y fixer leur résidence effective et permanente ou exercer une activité professionnelle ont droit à une carte de séjour. Les non résidents sont ceux qui transitent ou séjournent peu de temps et n'exercent aucune activité professionnelle. Les étrangers sont titulaires de droits dans le cadre de leur relation de travail conformément au code du travail qui s'applique à tous les travailleurs tant nationaux qu'étrangers et bénéficient de droits qui leur sont exclusivement réservés en raison de leur statut, de même qu'ils sont soumis à des obligations spécifiques.

Tableau 22 : législation concernant les résidents et non résidents en Algérie

législation	Contenu
ordonnance	Titres de séjour temporaires
Loi n° 81-1011/07/1981 ;décret application 25/12/1982 ; JO n°28 14/07/1981 ; décret relatif aux professions commerciales, industrielle, artisanale et littéraire exercé par un étranger sur le territoire national JO n°82 du 14/10/1975	Conditions de recrutement des travailleurs étrangers en Algérie. Institue le droit au travail pour les étrangers et les modalités et conditions pour prétendre à un emploi; conditions de forme et de fond devant être observées par les travailleurs ainsi que les organismes employeurs (obtention permis de travail ou autorisation de travail temporaire délivré par le ministère de l'emploi)
26/09/1975 JO n°82 du 14 octobre 1975	Organise les professions commerciales industrielles, artisanales et libérales lorsqu'elles sont exercées par des étrangers sur le territoire national
Décret n°86-27611/11/1986	Fixe les conditions de recrutement des personnels étrangers dans les services de l'état, des collectivités locales et établissements publics, les droits et obligations des travailleurs étrangers au moment de leur recrutement
Décret n°88-2809/02/88	Circulation et séjour des ressortissants français en Algérie
Décret n°03-250 du 11 juillet 2003 entré en vigueur en 2004	institue le visa de travail. Modifie le décret n°66-212 du 21 juillet 1966

Source: d'après Kerdoun (2008), complété par nous.

Les statistiques officielles algériennes ne couvrent que faiblement la réalité de l'immigration. Au RGPH de 1998, le nombre d'étrangers recensés en Algérie était de 71 609. La communauté la plus importante était celle originaire des pays arabes suivie de celle des pays africains.

Tableau 23 : Répartition des étrangers en Algérie par groupes de nationalités (RGPH 1998)

Nationalités	Effectifs
Pays arabes	57 599
Afrique	7 134
Asie	1 597
Europe de l'Est	1 778
Europe de l'ouest	3 243
Amériques	181
Autres pays et apatrides	77
TOTAL	**71 609**

En dehors des ressortissants des pays frontaliers, naturellement les plus nombreux, les quatre nationalités les plus importantes étaient les immigrés égyptiens (5 943), saoudiens (3 051), émiratis (4 143) et français (2 618).

Tableau 24 : Etrangers originaires des pays frontaliers établis en Algérie (RGPH 1998)

Pays frontaliers	effectifs
Maroc	18 661
Tunisie	8 389
Mali	4 162
Niger	1 204
République Arabe Sahraoui	1 773
Lybie	1 351
Mauritanie	800

Depuis 1998, la composition de la population étrangère établie en Algérie a changé. Deux communautés ont considérablement augmenté, celle subsaharienne et chinoise. En l'absence d'enquête récente, il faut attendre la publication des résultats du RGPH de 2008[90] pour avoir une évaluation de ces changements. Les bouleversements économiques en Algérie et dans la région[91] ont profondément modifié les caractéristiques de l'immigration et provoqué des flux nouveaux. On assiste à un éclatement du phénomène des migrations (migrations de transit, migrations circulaires, pluri-nationalité et pluri-résidence), le rendant difficile à cerner dans les cadres juridiques et institutionnels classiques. Deux phénomènes se sont développés, l'immigration irrégulière et les contrats d'importation de main d'œuvre étrangère, surtout chinoise[92].

3.3.2 Composition et dynamiques de l'immigration de travail et impact sur le marché du travail (composition de l'emploi, disponibilité des qualifications)

L'importation de main d'œuvre chinoise

Selon des statistiques récentes[93], en 2006, 32 000 étrangers de 105 nationalités travaillaient légalement en Algérie, dont 45% de Chinois, 11% d'Égyptiens, 3,5% d'Italiens[94]. Concentrées à 67% dans les wilayas d'Alger, Ouargla, Oran et Adrar, 51% étaient dans le secteur du BTPH, 41,2 l'industrie (particulièrement les hydrocarbures), 3,6% les services et 0,2% l'agriculture. 23% étaient cadres supérieurs, 21,7% cadres et techniciens supérieurs, 27,5% techniciens, 25,05% ouvriers qualifiés et 0,75% ouvriers non qualifiés. Depuis 2004, pour pouvoir travailler en Algérie, les étrangers sont tenus à un visa de travail. En 2004, 6969 permis ont été octroyés, dont 2827 à des travailleurs chinois.

90 Des questions spécifiques sur les migrations ont été intégrées au questionnaire.

91 En 2003, le durcissement des autorités libyennes vis à vis de l'immigration de travail africaine a eu pour conséquence de réorienter une partie des flux vers l'Algérie.

92 Sur les investissements indiens et chinois en Algérie, voir World Bank (2008).

93 Sources diverses.

94 suivis de Philippins, Américains, Français et Canadiens, dans une proportion d'environ 3% pour chacune de ces nationalités.

Tableau 25: Work permits issued to foreigners by nationality, 2004 (CARIM)

Country of nationality	Number of permits issued	Country of nationality	Number of permits issued
China	2.827	Morocco	216
Egypt	750	USA	174
Turkey	521	Philippines	131
United Kingdom	454	Russia	84
Italy	313	Spain	53
France	244	Other	959
Syria	237	**Total**	**6.963**

Source: Situation du marché national de l'emploi durant l'année 2004 ANEM ministère de l'emploi et de la solidarité nationale RADP Alger 2004

Nous ne disposons pas du nombre cumulé, sauf à travers une déclaration du Ministre du travail et de la sécurité sociale[95], selon lequel, parmi les 23 000 travailleurs étrangers possédant un permis de travail recensés en 2007 en Algérie (soit 0,70% du nombre total des travailleurs salariés) la main-d'œuvre chinoise venait en tête avec près de 19 000 travailleurs (0,38% de l'ensemble de la main d'œuvre salariée). Dans ce cadre, selon le Ministre du travail, « il a été fait appel à cette main-d'œuvre qualifiée pour les grands projets, notamment dans les travaux publics et l'hydraulique, avec des visas de travail ne dépassant pas trois mois et un permis de travail provisoire délivré par les services de l'emploi sachant que le travailleur étranger doit regagner son pays dès l'expiration de son visa de travail ». De son côté, le MAEP (2007) évoquait des dérogations à la législation du travail concernant les « entreprises étrangères dont les employés étrangers recrutés sur contrat ne cotisent pas à la Caisse Nationale de Sécurité Sociale (CNAS) et ne sont affiliés à aucune organisation syndicale ».

L'immigration subsaharienne

Les migrations entre les pays d'Afrique subsaharienne et l'Algérie sont très anciennes. Cette circulation migratoire, qui empruntait jadis les grandes routes du commerce transsaharien, a subi des transformations liées à la mise en place de frontières administratives - colonisation puis édification d'Etats indépendants - et au développement des économies nationales. Pendant la période de l'économie administrée, la législation restrictive eut pour conséquence le développement de réseaux informels de commerce, à la faveur des pénuries chroniques sur le marché algérien et en contrepartie de produits subventionnés par l'Etat algérien. A la fin des années 80, l'ouverture économique en Algérie supprime les distorsions de marché qui avaient donné lieu à ces échanges. Avec la libéralisation du marché du travail, la circulation humaine adossée à ces réseaux tend à se transformer en migrations de travail. Ces transformations, au rythme relativement lent, avaient préservé un certain équilibre dans les mécanismes traditionnels d'échanges économiques et humains. Elles s'accélèrent sous l'effet des restrictions à l'entrée légale de migrants africains en Europe, avec notamment la constitution de réseaux transnationaux de passeurs en Afrique et en Europe.

95 El Watan, 21 juin 2008.

L'immigration subsaharienne, probablement la plus importante en nombre, n'apparaît pas dans les statistiques officielles[96]. Faut-il en conclure qu'il s'agit exclusivement d'une migration en transit vers l'Europe? Deux études effectuées pour le réseau CARIM, (Bensaâd, 2008 ; Hammouda, 2008c) montrent que la réalité est plus complexe. Selon Bensaad (2008), cette population tendrait à être majoritaire vers les frontières Sud et représenterait 40% de la population de Tamanrasset, ville de plus de 100 000 habitants (avec plus de 20 nationalités dont 20 000 nigériens et 10 000 maliens) et un cinquième au moins de toutes les autres villes sahariennes frontalières. Elle serait plus de 15 000 à Alger, de 3 à 5 000 à Oran, 7 000 à Maghnia, près de la frontière marocaine. Il observe également une mutation de l'origine géographique, avec l'arrivée croissante de sénégalais, ghanéens, nigérians.

Les migrations irrégulières, comme le secteur informel, ne peuvent être saisies directement par les statistiques officielles. Hammouda (2008c), qui a procédé à une évaluation approximative à partir de l'identification de 21 "poches" de migrants, estime à plus de 21 500 la population subsaharienne en situation irrégulière en Algérie : 62,3% proviennent de pays frontaliers (surtout Niger avec 11200, soit 52,1% du total et Mali, 2186, 10,2%), les autres d'Afrique Occidentale (Nigeria, 1266, 5,9%; et Ghana, 1324, 6,2%) et Centrale (Cameroun, 1347, 6,3%) et même de plus loin. Ces immigrants ne sont pas tous entrés irrégulièrement dans le pays, et la migration de transit vers l'Europe n'est pas la seule composante de cette immigration irrégulière. Si ce phénomène tend à prendre de l'ampleur, c'est d'abord du fait du vide juridique concernant le statut des nouveaux migrants. Pour ce qui est de l'immigration de travail, son « illégalité » est liée au fait qu'elle trouve surtout à s'employer dans le secteur informel, dont nous avons vu le poids dans l'économie.

L'immigration subsaharienne de travail

Selon Bensaad (2008), largement présents sur le marché du travail au Sahara (mise en valeur agricole, BTP, services), l'immigration subsaharienne tend à s'étendre au-delà des régions sahariennes et de certaines 'niches' marginales comme la récupération (métaux, pneus, plastique), pour investir le marché du travail au Nord, notamment dans les métropoles littorales (BTP, confection, services, services domestiques). Au cours de son enquête, il a observé une élévation de son niveau socio-culturel et de qualification ainsi que sa féminisation (1/5 des flux)[97]. Initialement saisonnière, elle tend à un allongement de la durée des séjours (3 à 7 ans). L'agriculture et le BTP sont les premiers secteurs d'emploi. Dans les années 2000, des programmes de développement des zones sahariennes sont lancés dans le cadre du vaste plan de relance économique permis par la hausse du revenu des hydrocarbures. De grands projets de mise en valeur agricole [98] exploitent notamment les aquifères profondes d'eau dans la foulée des exploitations pétrolières. « Dans un Sahara insuffisamment peuplé, une telle opération n'aurait pu être possible sans l'apport de main d'œuvre étrangère (..) d'ailleurs jamais inquiétée dans ces zones agricoles ». Au Nord également, l'agriculture intensive recourt de plus en plus à cette main d'œuvre. On la trouve aussi dans la restauration et les services domestiques. L'enquête dénombre 60 ateliers africains de confection à Tamanrasset, jouissant d'une proximité avec les populations du Sahara et produisant à faible coût des biens adaptés au mode de vie sahélien. Dans les grandes villes du Nord, où ils travaillent notamment dans l'hôtellerie et les services domestiques, ils se regroupent sur des places publiques, « bourses du travail » de fortune, pour attendre l'embauche quotidienne par des entrepreneurs locaux.

Si l'Algérie devient un pays d'immigration issue d'Afrique subsaharienne, c'est qu'il existe des occasions de travailler et de percevoir un revenu permettant une épargne et même un transfert vers le pays d'origine, surtout dans le petit commerce (35,6%), et l'artisanat (17%) (Hammouda, 2008c). A 83,8% masculine et 69,3% issue de milieux urbains, cette migration est surtout

96 (Bensaad (2008) et Hammouda (2008c) évoquent une enquête sur la population de l'extrême sud algérien qui aurait été effectuée par l'ONS en décembre 1992, après un afflux massif de subsahariens du fait de conflits régionaux et de catastrophes naturelles, mais ses résultats n'ont pas été rendus publics.

97 Il avance aussi que c'est le Nigeria qui fournit la part la plus importante des migrants, cependant, il n'apporte pas de données chiffrées à l'appuie de ces observations.

98 Voir Cote (2002).

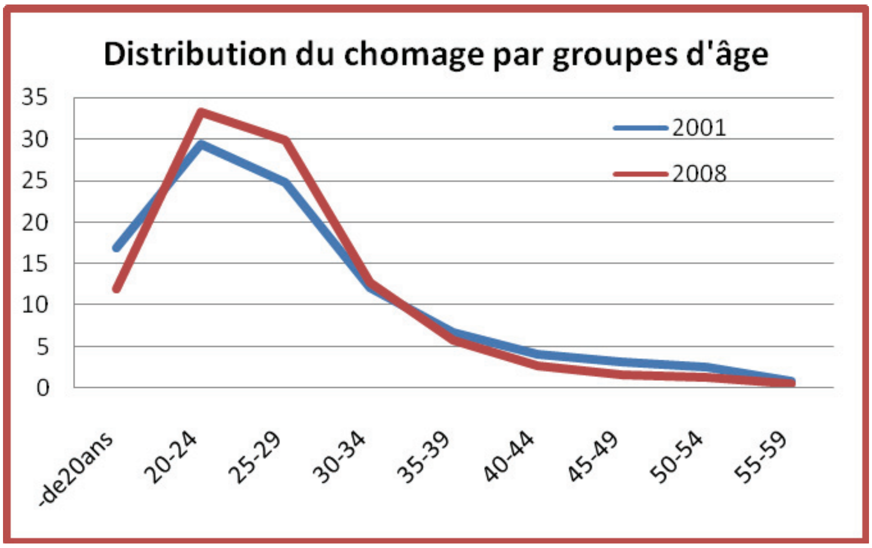
économique (47,2% ont moins de 30 ans, près des 2/3 moins de 35 ans, plus de la moitié sont mariés). Pour 81,4%, la raison principale du choix de la destination finale est le travail et 57% avaient dès le départ un projet de migration vers l'Algérie comme destination finale. Un tiers avait exercé une activité professionnelle dans d'autres pays et un tiers n'était arrivé à destination qu'après des tentatives répétées. La décision de migrer est souvent individuelle et remonte à plusieurs années. Le migrant anticipe un meilleur revenu dans le pays d'accueil bien qu'il n'ait en général pas de qualification particulière. 86,8% travaillait déjà dans le pays d'origine, mais pour un tiers il s'agissait d'emplois précaires (temporaires ou saisonniers). Ces enquêtes, qui ont le mérite d'exister, restent toutefois limitées.

3.4 Brève analyse des autres principaux défis

3.4.1 Chômage des jeunes

Le chômage affecte différemment les *groupes d'âge de la population active* en touchant principalement les jeunes. Le taux de chômage dans cette catégorie suit, certes, la tendance générale à la baisse au cours des dernières années mais reste, néanmoins, particulièrement important : le chômage parmi les jeunes de moins de 25 ans, avec un taux de 25%, dépasse le double de la moyenne nationale. Compte tenu de l'importance de cette catégorie dans la population active totale, la distribution de la population en chômage suivant les classes d'âge sera alors fortement asymétrique sans que cette tendance ne se résorbe malgré la baisse du taux de chômage enregistrée au cours des dernières années.

Figure 10 : Distribution du chômage par groupes d'âge



Source : ONS diverses années

3.4.2 Chômage des femmes

Le chômage frappe aussi de façon particulière la population active féminine renforçant ainsi son caractère vulnérable. Le tableau ci-dessous qui présente l'évolution du taux de chômage par genre montre que le taux de chômage féminin est, depuis 2001, constamment plus élevé que celui des hommes. L'écart est croissant sur la dernière période renforçant l'inégalité au travail entre hommes et femmes. Il atteint un pic en 2008 où il dépasse de 6 points la moyenne nationale. La population féminine n'a ainsi pas bénéficié d'une façon égalitaire de la baisse du chômage et des opportunités de travail ainsi créées.

Tableau 26 : Evolution du taux de chômage par genre

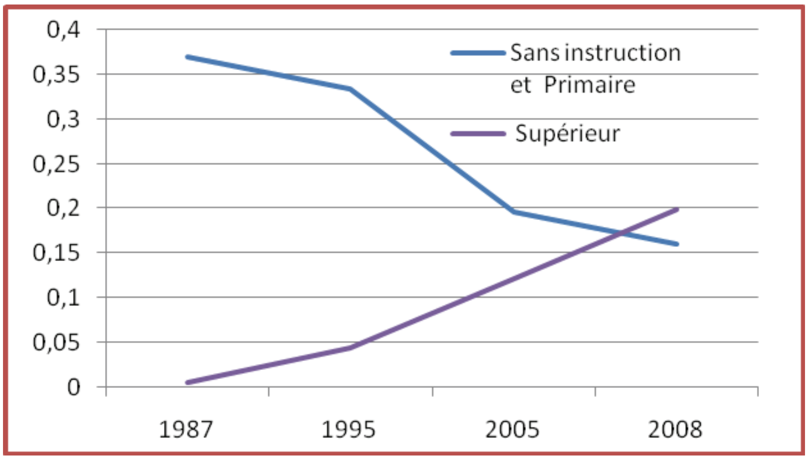
ANNEE	1997	2000	2001	2002	2003	2004	2005	2006	2007	2008
MASCULIN	26,8%	29,2%	26,6%	/	23,4%	17,5%	14,9%	11,8%	12,9%	10,1%
FEMININ	23,9%	26,4%	31,4%	/	25,4%	18,1%	17,5%	14,4%	18,3%	17,4%

Source : ONS

3.4.3 Éducation, formation et chômage

Un autre facteur déterminant de la probabilité d'entrer en chômage est *le niveau d'instruction et de formation.* L'observation du taux de chômage par niveau d'instruction montre que celui touche surtout les catégories à niveau d'instruction moyenne. Néanmoins, en termes dynamiques, on constate une diminution du nombre de chômeurs sans instruction particulière parallèlement à une augmentation des 'chômeurs diplômés'.

Figure 11 : Evolution du taux de chômage par niveau d'instruction



Source : ONS

Cette évolution en ciseau marque un nouveau palier en 2008 où le nombre de chômeurs diplômés dépasse pour la première fois celui des sans instruction ou possédant une instruction primaire. Il s'agit d'une situation de profonde inefficience macroéconomique pour au moins trois raisons majeures : (i) Il s'agit d'un gaspillage de ressources qui ont été investies dans l'accumulation de capital humain sans que celui-ci ne contribue à la croissance économique ; (ii) le chômage des jeunes avec qualification affecte négativement l'incitation des jeunes à investir en capital humain sachant la forte probabilité de ne pas valoriser cet investissement. Ils préfèrent allouer leur temps disponible au travail formel ou informel, ce qui limite l'accumulation du capital humain alors que celui-ci constitue une externalité positive à l'échelle de l'économie (Lucas 1990) ; (iii) le chômage des diplômés est un traumatisme social. Il engendre des anticipations pessimistes et, lorsque celles-ci sont autoréalisantes, elles conduisent progressivement à une trappe de non développement[99].

99 Sur la relation entre la nature des anticipations des agents et celle de l'équilibre de long terme dans les modèles à équilibres multiples, cf Zilibotti (1994) et d'Autume et Michel (1996).

SECTION 4. POLITIQUES D'EMPLOI ET REFORMES DU MARCHE DU TRAVAIL

L'évolution à la hausse du chômage à partir de 1986 a conduit les pouvoirs publics à développer une politique multiforme de promotion de l'emploi pour répondre aux besoins d'emploi induits par la croissance de la population active. Le Plan complémentaire de soutien à la croissance (PCSC) a annoncé un objectif de création de deux millions d'emplois entre 2005 et 2009 parmi lesquels un million d'emplois permanents. Selon les statistiques de l'ONS, 1,1 millions d'emplois ont été créés au quatrième trimestre 2008 parmi lesquels 600.000 emplois permanents (salariés permanents et employeurs et indépendants)[100]. Ces performances doivent toutefois être confrontées aux contraintes auxquelles toute politique de promotion de l'emploi doit faire face dans les pays en développement et qui sont liées notamment à l'importance du chômage des jeunes primo-demandeurs d'emploi, aux rigidités institutionnelles ainsi qu'à l'existence d'un secteur informel important qui limite tout impact de la régulation institutionnelle sur les performances du marché du travail.

Une politique nationale d'emploi devrait relever (i) de la promotion de l'investissement créateur d'emplois, (ii) des politiques actives d'emplois qui sont une intervention directe de l'Etat sur le marché du travail ainsi que (iii) de la mise en place de procédures adéquates de régulation du marché du travail.

Le 'Plan d'actions pour la promotion de l'emploi et la lutte contre le chômage' mis en œuvre en Juillet 2008 définit pour la première fois un cadre articulé de promotion de l'investissement créateur d'emplois et de politiques actives de l'emplois. Il vise (i) le soutien à l'investissement créateur d'emplois, (ii) la promotion de la formation professionnelle et des métiers(iii) une politique multidimensionnelle d'incitation des entreprises à la création d'emplois, (iv) la modernisation de la gestion du marché du travail à travers l'appui aux institutions du marché du travail et notamment l'Agence Nationale EM, (v) la promotion de l'emploi des jeunes à travers un nouveau dispositif d'aide à l'insertion professionnelle, (vi) le suivi et l'évaluation du Plan d'actions par des structures nationales.

4.1 Les dispositifs de soutien à la création d'emplois

En fait, l'aspect le plus visible de la politique nationale d'emplois en Algérie a jusque là été la mise en œuvre de politiques actives[101] à travers des dispositifs d'emplois 'd'attente de la croissance'[102] par les pouvoirs publics ou encore de soutien à la création d'activités par les jeunes chômeurs. Ces programmes ont été initiés dès 1988 à travers le programme d'emploi des jeunes qui a consisté à exonérer les entreprises de certaines taxes (Versement Forfaitaire et ITS) sur les salaires versés aux jeunes chômeurs recrutés. Jusqu'en 2008, ces dispositifs visaient à placer les jeunes chômeurs dans des emplois temporaires auprès des collectivités locales (Emplois Salariés d'Initiative Locale -ESIL) pour une période de 6 à 12 mois afin d'avoir une formation et une expérience de base et augmenter leur chance de trouver un emploi. Les bénéficiaires sont les demandeurs d'emploi de 19 à 40 ans sans qualification. Pour les jeunes qualifiés, pour lesquels le chômage est très élevé, un dispositif spécifique a été mis en place depuis 1999, le « contrat pré-emploi » (CPE), qui permet le recrutement par les

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100 Cependant, il y a lieu de prendre avec précaution les résultats d'enquête de l'ONS sur l'emploi. L'ONS évalue les créations d'emplois au cours des quatre années 2005-2008 à 245.000, 824.000, -274.000 et 551.757. Ces chiffres semblent peu raisonnables au regard de la régularité de la croissance hors hydrocarbure au cours de la période : 4,7% en 2005, 5,6% en 2006 et 6,7% en 2007. Si on se réfère aux évaluations du Plan, celui-ci annonce des créations d'emplois entre 2005 et 2007 de 448.000, 505.000 et 267.000 soit un total de 1.220.000 emplois créés au cours des trois années 2005,2006 et 2007. Le Plan n'affiche pas cependant ses méthodes d'évaluation.

101 Les politiques actives regroupent l'ensemble des dispositifs visant soit à inciter le travailleur au chômage ou le jeune à la recherche du premier emploi à créer sa propre entreprise, soit à permettre au jeune d'occuper un emploi (temporaire ou à caractère durable).

102 Selon l'expression du Conseil national économique et social (CNES).

employeurs de chômeurs qualifiés pour une période de 1 an renouvelable 6 mois avec une subvention totale de la rémunération la première année. Les bénéficiaires sont les primo-demandeurs d'emploi universitaires ou techniciens supérieurs.

L'Indemnité d'activités d'intérêt général (IAIG) est un autre programme qui a eu pour objet la participation à des activités d'intérêt général dans le cadre du filet social contre une indemnité mensuelle dont le bénéficiaire doit être un membre d'une famille sans revenu. Le dispositif est géré par l'Agence de Développement Social.

Plus pénibles, les Travaux d'utilité publique à haute intensité de main-d'œuvre (TUP-HIMO) – entretien des routes, hydraulique, agriculture – ont fait partie d'un programme ciblant les chômeurs sans qualification et dont la rémunération est fixée au salaire minimum. Ce dernier programme est également géré par l'Agence de Développement Social.

Les politiques actives portent également sur les dispositions relatives à la création d'entreprise. Parmi celles-ci, le programme relatif à la micro-entreprise mis en œuvre depuis 1997 par l'Agence National de Soutien à l'Emploi des Jeunes (ANSEJ) a pour but de soutenir la création d'entreprise par de jeunes promoteurs de 19 à 35 ans qualifiés. Le programme est financé sur le Fonds spécial de soutien à l'emploi des jeunes. Un autre programme qui s'adresse aux chômeurs de plus de 35 ans non éligibles à la micro-entreprise est le micro-crédit qui permet à la personne éligible de bénéficier d'un prêt pour acquérir de petits équipements en vue d'un travail indépendant. La Caisse Nationale d'Assurance Chômage participe également aux programmes de création d'entreprises dans le cadre du dispositif CATI (Centre d'Aide au Travail Indépendant) pour faire bénéficier les travailleurs compressés de l'assistance et l'accompagnement dans la création d'entreprise.

L'ensemble de ces dispositifs prévoient des schémas d'incitations qui intègrent généralement un apport personnel réduit, des prêts sans intérêt ou des bonifications de taux d'intérêt. La création d'emploi pour l'ensemble des dispositifs au cours de la période 2000-2005 est résumée par le tableau suivant :

Tableau 27 : Création d'emploi par les politiques actives

Année	Emplois d'attente (ESIL, IAIG, CPE,TUP-HIMO)	Création d'activité Micro-entreprises Micro-crédits	Total
2000	220 013	29831	249 844
2001	241 787	27854	269 641
2002	251 355	43157	294 512
2003	264 463	14771	279 234
2004	320 580	19077	339 657
2005	303 342	35292	338 634
2007 (9 premiers mois)			497.000

Ces programmes ont créé en moyenne entre 2000 et 2005 près de 300 000 emplois annuellement et leur financement au cours de cette période a représenté en moyenne une dépense publique annuelle de 0,4% du PIB. Les emplois crées par la mise en œuvre de ces politique ont généralement un caractère temporaire et sont critiqués pour leur peu d'efficacité à réduire le chômage. Effectivement, ces dispositifs n'ont pas eu le résultat escompté en termes de *permanisation* de l'emploi créé par le maintien de la relation de travail. Ainsi, pour les emplois salariés d'initiative locale (ESIL), seuls 3,3% des emplois créés durant la période 1999-1994 ont été maintenus. Il en est de même pour les contrats pré emplois qui ont permis de créer 35.000 emplois entre 1998 et 2002 mais dont seuls 4000 postes ont pu être permanisés, soit 12% environ de l'ensemble des emplois créés.

Ces résultats montrent la limite du traitement volontariste du chômage et la nécessité d'un traitement économique pour répondre d'une façon durable à la question du chômage. Certains économistes comme J. Attali estiment que le travail à mi-temps – et plus généralement les politiques d'aide à l'emploi- est, pour les plus jeunes, un pis-aller, du fait de son caractère subi et du demi-salaire qui en résulte. Il n'aurait de sens que s'il conduit à un emploi à plein temps. Cela est vrai bien que ces dispositifs, pour aussi lourds qu'ils soient, ont le mérite de briser la 'fatalité du chômage', de réduire le coût psychologique du chômage en maintenant une relation –même partielle- entre le chômeur et le monde du travail et de limiter l'obsolescence du capital humain pour les chômeurs qualifiés. Le problème est d'assurer la durabilité des emplois ainsi crées en aidant à permaniser autant que faire se peut la relation de travail entre l'entreprise et les bénéficiaires d'emplois d'attente.

4.2 La nouvelle politique nationale d'emplois

C'est dans ce cadre que l'ensemble des dispositifs entrant dans la politique active d'emploi ont été revus pour être fondus, depuis Juillet 2008, dans le 'Dispositif d'aide à l'insertion professionnelle des jeunes'. Celui-ci englobe le soutien à la création d'emplois salariés (Dispositif d'Aide à l'Insertion Professionnelle) et les dispositions relatives au soutien à la création d'entreprise.

Le mécanisme d'aide à l'insertion professionnelle s'adresse aux jeunes primo demandeurs d'emplois et stipule trois formes de contrat de travail aidé suivant la qualification initiale du jeune:

- Les Contrats d'insertion des diplômés (CID) devant concerner 110.000 jeunes diplômés,
- Les Contrats d'insertion professionnelle (CIP) qui doivent toucher 200.000 jeunes,
- Les Contrats de formation/insertion (CFI) qui devront prendre en charge 90.000 jeunes sans formation.

Dans chaque cas, le jeune perçoit des indemnités modulées suivant le type de contrat d'insertion allant de 4000 DA (pour le CFI), 8000 DA pour le CIF à 12000 DA pour le CID mensuellement. Par ailleurs, l'entreprise bénéficie d'un abattement de la part patronale de la Sécurité sociale ainsi que des réductions d'impôts (IRG ou IBS) en cas de recrutement durable.

Concernant le maintien de la relation de travail qui constitue certainement l'aspect majeur des politiques actives, l'objectif du nouveau dispositif est de permettre un taux de recrutement durable de 30%. Il s'agit d'un taux qui se situe au niveau du triple de celui enregistré jusque là par les dispositifs existants. Dans cette perspective, des incitations aux entreprises et des facilitations de formation pour le jeune sont proposées pour encourager le maintien de la relation de travail par :

- l'institution d'un contrat de travail aidé (CTA) qui octroie une subvention de salaire à l'entreprise -durant cinq ans dans le cas d'un CID- lorsque celle-ci s'engage à un recrutement durable ainsi que des réductions d'impôts (IRG ou IBS) et un abattement de la part patronale de la Sécurité sociale,
- l'aide au financement de la formation du jeune recruté sur la base du Contrat Emploi-Formation

(CEF),

- L'encouragement du jeune à la recherche de formation qualifiante par l'octroi d'une prime pendant 6 mois. Cette prime à la recherche de formation est novatrice car elle considère la recherche et la mise à niveau des qualifications comme une activité devant être rémunérée. Cependant, la mesure sera limitée à une liste de métiers en déficit fixée par des dispositions réglementaires. Il serait beaucoup plus utile de généraliser la disposition à tous les métiers (le jeune va lui-même certainement choisir le métier qui lui convient et qui serait en déficit).

Le nouveau dispositif propose également des aménagements qualitatifs aux programmes existants de création d'entreprise de l'ANSEJ et de la CNAC. Ceux-ci portent notamment sur une plus grande décentralisation des décisions d'octroi des aides, la formation des promoteurs dans le domaine du management ainsi que des procédures de financement bancaire simplifiées et décentralisées.

Les programmes inscrits dans le cadre du DAIP devraient permettre la création de 400.000 emplois annuellement parmi lesquels le tiers, soit 130.000 emplois, seraient susceptibles d'être maintenus. Quant aux dispositifs ANSEJ et CNAC, ceux-ci permettraient, à travers le lancement de 17.000 entreprises, de générer 55.000 postes de travail pour une moyenne de 3,2 emplois par projet. Au total, de l'ensemble des programmes mis en œuvre par ce nouveau dispositif, il est attendu une création nette d'emplois durables de l'ordre de 185.000 emplois annuellement.

Si on se limite aux seules indemnités octroyées aux travailleurs et aux dépenses de formation suivant le dispositif pour lequel le travailleur est éligible, le financement des programmes à la charge de l'Etat s'élèverait annuellement à 48 Milliards de DA. Le coût de création d'un emploi d'attente serait ainsi de 120.000 DA.

Pour évaluer le coût d'un emploi durable, il faut tenir compte des dépenses liées au contrat de travail aidé qui lie l'entreprise, le travailleur et l'Etat durant plusieurs années. Ces coûts sont évalués par la Stratégie de promotion de l'emploi, compte tenu des subventions de salaires versées, à 57 Milliards de DA pour un total de 130.000 emplois durables créés. Ainsi, le coût d'un emploi durable à la charge de l'Etat, y compris le soutien à la formation, serait de l'ordre de 500.000 DA.

4.3 La législation du marché du travail

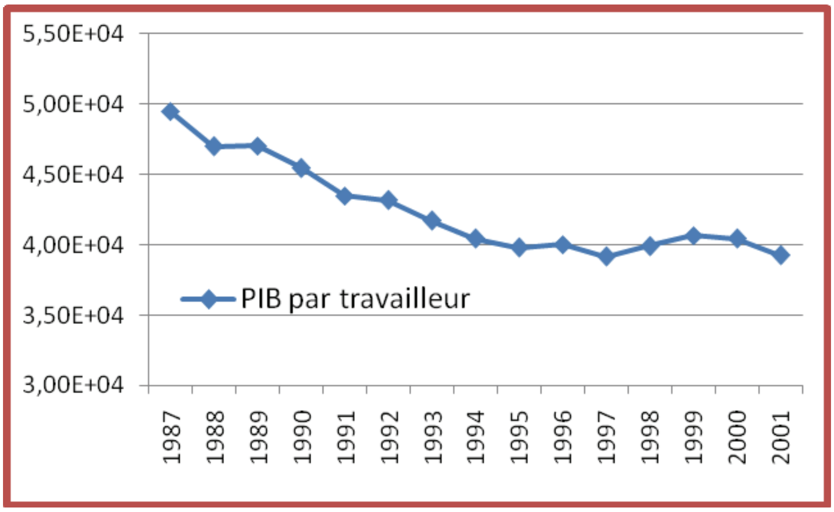
L'intervention de l'Etat sur le marché du travail porte non seulement sur les politiques actives de création d'emplois mais également sur la réforme des institutions du marché du travail pour améliorer leur qualité.

Au lendemain de l'indépendance, après une brève expérience autogestionnaire, se met en place une économie administrée organisée autour de l'entreprise publique qui laisse peu de place au secteur privé, cantonné dans des niches ciblées et se reproduisant par la rente que l'absence de concurrence interne et externe lui assurait. Dans ce système, l'Etat, omniprésent, devient le premier employeur, le premier investisseur, le premier producteur et génère, durant la période 1973-1985, dans le secteur industriel (public) et l'administration la moitié de l'ensemble des emplois hors agriculture. La relation de travail est régie par le Statut Général des Travailleurs (SGT), une grille de rémunération qui fixe les salaires dans le secteur public ainsi que les primes de rendement individuel et collectif. Le début des années 90 marque la volonté de réformer les institutions du marché du travail dans la perspective d'une plus grande flexibilisation. Un certain nombre de lois sont adoptées dans ce cadre, parmi lesquelles les lois de 1990 relative aux relations de travail (licenciement économique, négociations collectives, recours à la grève, contrat à durée déterminée), aux modalités d'exercice du droit syndical, aux règlements des conflits de travail et l'exercice du droit de grève. D'autres dispositions réglementaires ont ensuite été prises en 1994 et 1997 portant sur l'institution de la retraite anticipée, de l'assurance chômage et du travail à temps partiel. L'ensemble de ces dispositions a été introduit, on le voit, en vue d'une plus grande flexibilité du marché du travail dans le but attendu d'atténuer la sévérité du chômage. Elles visent, en effet, des conditions de licenciement plus permissives, un désengagement de l'Etat de la fixation des salaires (hormis le salaire minimum) au profit des négociations collectives. Par ailleurs, la liberté syndicale et le droit de grève sont officiellement reconnus.[103]

L'impact de ces réformes sur le marché du travail et notamment sur une atténuation du chômage par la plus grande flexibilité des conditions d'embauche et de licenciement des travailleurs n'a pas été positif. Le taux de chômage a poursuivi durant les années 1994-2000 sa tendance à la hausse passant au cours de cette période de 24,5% à 29% de la population active. En fait, la déprotection de l'emploi par la flexibilisation du fonctionnement du marché du travail a un effet ambigu sur le niveau du chômage. Si elle augmente les flux d'entrée sur le marché du travail en facilitant l'embauche, elle favorise également les flux de sorties. Tout ce qu'on peut dire est que la déprotection de l'emploi réduit la durée de chômage en dynamisant les flux d'entrée et de sortie et rend ainsi le marché du travail plus réactif aux chocs externes[104].

Si on n'observe pas une augmentation massive de l'emploi à la suite de la mise en œuvre des réformes, la question se pose de savoir si celles-ci se sont accompagnées alors d'une augmentation de la productivité du travail. En fait, il existe des écarts significatifs entre les données du Plan et de l'ONS quant à l'évolution de l'emploi au cours de la période. Aussi, pour préserver l'homogénéité des séries, nous avons retenu, pour évaluer la productivité du travail, une seule source des données, en l'occurrence les données du Plan, ces dernières ayant l'avantage de présenter des séries longues et qui sont repris par les publications du FMI depuis 1996.

Figure 12 : Evolution de la productivité du travail avant et après les réformes de 1990-1994



Source d'après ONS

La productivité du travail qui montrait un trend baissier fortement significatif avant les réformes de 1990-1994 ne présente plus de tendance à la baisse au-delà de 1994. Cependant, ce léger relèvement de la productivité du travail sur la période post- réformes serait du non seulement à une faible croissance de l'emploi mais surtout à une reprise de la croissance. En tous cas, même si on peut établir un changement dans le trend de croissance de la productivité du travail à partir de l'année des réformes, 1994, cette corrélation ne signifie pas une causalité et seule une analyse économétrique permettrait d'estimer statistiquement la contribution des réformes au relèvement de la productivité du travail.

103 Pour une présentation détaillée de la régulation du marché du travail, Cf Profil pays Algérie – Femise 2005 pp 9 et suivantes.

104 Cf Blanchard et Tirole (2003)

On ne pouvait s'attendre à une forme quelconque d'indexation des salaires réels sur la productivité au cours de la période. Bien plus, les mesures de stabilisation économiques portées par les programmes d'ajustement structurel du FMI visaient une réduction de la demande par la libéralisation des prix. L'inflation a atteint un taux de 30% entre 1994 et 1996 mais, au-delà de cet effet en impact, la réduction des salaires réels a permis au cours des années qui suivirent de faire baisser ce taux au dessous de 5% (1998):

Tableau 28 : Evolution du salaire réel 1988-1996

	1988	1989	1990	1991	1992	1993	1994	1995	1996
Salaire brut moyen en DA	3646	4018	4776	6070	8102	9390	11025	13721	14006
IPC (raccordement des bases 1969 et 1982	91,5	100	117,9	148,4	195,4	235,5	303,9	394,4	468,1
Salaire réel en DA 1989	3985	4018	4051	4090	4146	3987	3628	3479	2992

Ainsi, cette relative amélioration de la productivité du travail ne s'est pas traduite par un relèvement du salaire réel moyen. Bien plus, l'objectif, au cours de cette période, d'une réduction de l'inflation par une politique salariale stricte, a fait baisser le salaire réel de plus de 17% entre 1994 et 1996.

Si on peut dire que les pouvoirs publics en Algérie accordent une attention particulière à la question de l'emploi et notamment à la promotion de l'emploi des jeunes, les dispositifs qui avaient prévalu jusque là relevaient plus de la solidarité nationale que de l'insertion dans le monde du travail. Il semble que le nouveau dispositif d'aide à l'insertion professionnelle, qui a déjà touché 186.000 jeunes depuis son lancement en Juillet 2008, ait pris acte de la nécessité de mieux organiser les politiques actives de l'Etat à travers une plus grande attention portée à la formation et à l'insertion des diplômés et de poser la question du maintien de la relation de travail comme élément central du dispositif.

Il reste cependant que l'absorption par l'économie de 30% des emplois d'attente créés nécessite une relance de l'investissement à travers non seulement des incitations, comme cela apparaît dans les autres axes de cette stratégie, mais également et surtout par l'approfondissement des réformes économiques pour libérer l'investissement et la croissance.

Tripler le taux de maintien des emplois créés pour le faire passer de 10-12% à 33% en une année n'est pas seulement une hypothèse de travail mais un programme de relance de la croissance macroéconomique, de mobilisation de l'investissement privé et de suppression de contraintes à l'investissement à travers la réforme du système bancaire, l'assainissement du foncier économique et la régulation des marchés de biens et services. C'est seulement lorsque la question de l'emploi est inscrite dans un cadre de stratégie économique globale qu'elle a le plus de chance d'être résolue.

L'autre dimension d'une stratégie de promotion de l'emploi est celle de la régulation du marché du travail. Un projet de révision du dispositif législatif régissant l'organisation du marché du travail est annoncé mais n'a pas encore vu le jour. Annoncée comme imminente depuis 2005 et inscrite dans le Pacte National Economique et social (2006), sa révision est sans cesse reportée. Elle devrait introduire plus de flexibilité dans les contrats de travail.

Cependant, son impact sera incertain sauf peut-être pour ce qui concerne une réduction éventuelle des charges des entreprises et leur contribution à la CNAC. En tout état de cause, au-delà de la réforme des institutions du marché du travail, seul un traitement économique du chômage par la relance de la croissance est à même de constituer une source d'emplois durables. L'importance de l'informel et des emplois d'attente dans le total de la population occupée laisse supposer un faible impact des institutions dans l'évolution de l'emploi et de la structure du marché du travail.

SECTION 5. L'IMPACT DES FLUX D'EMIGRATION DE TRAVAIL SUR LE MARCHE DU TRAVAIL NATIONAL

5.1 Estimation et caractéristiques de l'émigration

Il faut d'abord relever la faiblesse de l'information statistique sur l'importance et les caractéristiques de l'émigration algérienne. Il s'agit cependant d'une constatation générale dès lors que la circulation des personnes à l'échelle mondiale est beaucoup moins connue et étudiée que les mouvements de marchandises et de capitaux. Cependant, par rapport aux pays de destination, l'information sur l'immigration peut provenir du registre de population pour les pays qui en tiennent un, de l'enregistrement des cartes de résidence et des permis de travail ou enfin des recensements et enquêtes statistiques. Par rapport aux pays d'origine, l'enregistrement de l'émigration au niveau des consulats constitue une source alternative d'information sur les flux migratoires.

Les statistiques sur l'immigration ne sont pas sans poser de problèmes. Au-delà des insuffisances propres aux instruments d'évaluation (mise à jour de l'information sur les permis de travail et de leur nombre, périodicité longue des recensements, inférence statistique à partir d'enquêtes,…), il faut noter que ces statistiques n'appréhendent pas la totalité de l'immigration irrégulière qui constitue un pan important de la communauté étrangère échappant aux politiques de régulation migratoire. Celle-ci est évaluée en France, par exemple, dans une fourchette allant de 200.000 à 400.000 'sans-papiers'.

Par ailleurs, un problème de qualification de la position d'immigré se pose. Celle-ci peut être liée à la naissance de la personne dans un pays étranger (approche OCDE) ou encore faire référence en plus à la nationalité à la naissance du résident (approche INSEE) ou enfin se référer à la nationalité étrangère du migrant (Allemagne). Dans les deux premier cas, la qualité d'immigré est permanente et ne sera pas dépendante de la législation en matière de naturalisation alors que dans le dernier cas, elle se confond avec celle d'étranger. La nationalité à la naissance n'est importante que pour certains pays de destination lorsque des personnes sont nées à l'étranger avec la nationalité du pays actuel de résidence. C'est le cas pour l'émigration algérienne vers la France qui a vu un rapatriement massif des colons français (communauté dite 'pieds-noirs' après l'indépendance. Ces derniers ne peuvent pas être considérés comme des émigrés. Aussi l'INSEE considère-t-elle comme immigré une personne née étrangère à l'étranger et résidant en France, ce qui permet d'exclure les rapatriés français de la population émigrés.

Le concept opératoire pour l'Algérie, pays d'origine, est celui de communauté nationale établie à l'étranger. La quantification de celle-ci se fait à travers les immatriculations aux postes diplomatiques ou consulaires. En conséquence, la communauté algérienne à l'étranger comprend :

- Les personnes de nationalité algérienne résidentes à l'étranger,
- Les personnes nées en Algérie et de père né en Algérie et résidente à l'étranger,
- Les personnes nées à l'étranger ayant deux ascendants en ligne paternelle nés en Algérie.

Ainsi, l'approche des autorités algériennes en termes de communauté algérienne à l'étranger rompt avec celle, plus restrictive, d'immigration d'origine algérienne adoptée par les pays d'accueil. Elle intègre en son sein les enfants d'immigrés qui sont exclus des statistiques des pays d'accueil pour ne pas être des immigrants[105]. Naturellement, les statistiques relatives à la communauté algérienne établie à l'étranger différeront à la hausse de celles de l'immigration d'origine algérienne, la première population englobant la seconde[106].

105 Ce qui n'empêche pas certaines institutions françaises de les qualifier « d'immigrés » de seconde génération.

106 La base de données CARIM donne 1.101.253 ressortissants algériens à l'étranger immatriculés dans les consulats algériens en France en 2003.

Toutefois, s'agissant de l'étude des flux migratoires, on utilisera les statistiques relatives à l'immigration d'origine algérienne telles que reportées par exemple par l'OCDE dans leur dernière mise à jour, l'INSEE ou la base de données CARIM. Les statistiques de l'OCDE se rapportent aux personnes nées en Algérie et résidentes à l'étranger (*foreign-born*). Comme ces statistiques ne font pas référence à la nationalité à la naissance, nous utiliserons dans le cas précis de la France les informations reportées par l'INSEE. Lorsque ces dernières ne sont pas disponibles, nous utiliserons les statistiques de l'OCDE pour faire des estimations sachant que les rapatriés d'Algérie vers la France sont de nationalité française et ont eu en 1999 au moins 37 ans d'âge et de séjour en France. La base de données intégrée CARIM sera également utilisée notamment pour étudier les caractéristiques des flux migratoires

Par ailleurs, les statistiques qu'on utilisera ne retiennent que les pays de l'OCDE comme pays destinataires. Il peut s'agir d'une limitation sérieuse. Cependant, si on tient compte des données fournies par le CNES et qui estiment les émigrés hors OCDE à 6%, les statistiques qu'on utilisera représenteront près de 95% de la population des immigrés algériens de sorte que les conclusions qualitatives que nous pouvons tirer ne nous semblent pas devoir être affectées par notre démarche. C'est donc par rapport à ces différentes limitations que les conclusions de cette section doivent être rapportées.

La démographie de l'immigration algérienne

Les émigrés algériens de plus de 15 ans représentent en 1999 une communauté de plus de 700.000 personnes. Ainsi, parmi la population d'origine algérienne (de nationalité algérienne à la naissance), 2,4% sont des émigrés. La France constitue la destination privilégiée de l'émigration algérienne. Elle accueille 83% de la population totale d'origine algérienne. Cette grande concentration de la communauté d'origine algérienne à l'étranger s'explique par l'histoire de la colonisation française en Algérie et les accords bilatéraux qui ont jalonné la période post indépendance. Plus généralement la répartition entre les pays de l'OCDE des migrants d'origine algérienne montre que ceux-ci sont plus enclins à s'installer dans les pays du Sud de l'Europe ainsi qu'au Canada, en Grande Bretagne et aux Etats-Unis. Huit pays (France, Espagne, Canada, Belgique, Italie, Grande Bretagne et USA) accueillent plus de 96% de l'ensemble des immigrés algériens. C'est surtout sur ces pays que nous porterons l'attention dans la suite.

Dans l'ensemble, les femmes représentent près de 40% des immigrants algériens. La politique de regroupement familial mise en œuvre particulièrement en France et dans les 'pays d'installation' contribue, après les vagues de migration des hommes, à un rééquilibrage de la structure démographique de la population immigrée.

Dans son acceptation large de *'foreign-born'*, la population installée en France peut se décomposer en 1999 en 400.676 immigrants nés en Algérie et ayant gardé leur nationalité algérienne, 151.219 immigrants nés en Algérie, algériens de naissance et ayant acquis la nationalité française et 657.994 personnes nés en Algérie de nationalité française à la naissance (rapatriés français et auxiliaires de l'armée française en 1962)[107].

La communauté algérienne à l'étranger ayant gardé sa nationalité d'origine représente une part importante de la population immigrée. En effet, près de trois émigrés algériens sur quatre sont de nationalité algérienne. Ce taux reflète les plus ou moins grandes restrictions imposées à l'acquisition de la nationalité du pays d'accueil. Il révèle également un lien robuste au temps des émigrés à leur pays d'origine lorsqu'on sait par ailleurs que près de la moitié des émigrés algériens ont une durée de séjour moyenne de plus de 20 ans (cf infra).

107 Ces estimations résultent d'un croisement des bases de données de l'OCDE qui précisent la nationalité en 1999 des immigrants et celle de l'INSEE qui n'intègre pas les français de retour en France.

Tableau 29 : Répartition des émigrés algériens selon les pays de destination (diverses années)

PAYS DE DESTINATION	HOMMES		FEMMES		TOTAL	
France	320 100	80,6%	231 796	85,5%	551 896	82,6%
ESP	17 740	4,5%	7 040	2,6%	24 780	3,7%
Allemagne	10 063	2,5%	3 492	1,3%	13 555	2,0%
CAN	10 210	2,6%	7 225	2,7%	17 435	2,6%
BEL	7 979	2,0%	6 326	2,3%	14 305	2,1%
ITA	7 649	1,9%	3 757	1,4%	11 406	1,7%
USA	6 619	1,7%	3 861	1,4%	10 480	1,6%
GBR	7 132	1,8%	2 801	1,0%	9 933	1,5%
CHE	3 510	0,9%	2 314	0,9%	5 824	0,9%
SWE	1 190	0,3%	620	0,2%	1 810	0,3%
Autres destination OCDE	4 941	1,2%	1 832	0,7%	6 773	1,0%
Autres destinations méditerranée	3415(*)	0,9%(*)	5 396(*)	2,0%(*)	43 453	6,1%
Total général(**)	400 548	100,0%	276 460	100,0%	711 650	100,0%

Source : d'après DOIC OCDE 2008, INSEE, DATABASE CARIM
(*) Hors Maroc et Syrie.
(**) Le total porte sur diverses années.

Tableau 30 : Répartition des émigrés algériens selon la nationalité

	Nationalité algérienne	Nationalité du pays de résidence
FRA	72,6%	27,4%
AMERIQUES (USA+CANADA)	43,5%	56,5%
ENSEMBLE OCDE	**70,2%**	**29,8%**

Source : OCDE, INSEE et CARIM

La structure par groupe d'âge de la population émigrée (de plus de 15 ans) fait apparaître une prédominance des personnes âgées. Près de 15% de cette population a plus de 70 ans alors que la catégorie de jeunes entre 15 et 25 ans n'en représente que 7,4 %. Cette structure est principalement tirée par la population installée en France notamment par la classe d'âge supérieure à 45 ans qui représente plus de la moitié des émigrés résidents en France (57%).

Tableau 31 :Répartition des émigrés algériens par groupe d'âge

		15 to 24	25 to 34	35 to 44	45 to 54	55 to 64	Over 65	TOTAL

France		7,3%	16,1%	19,6%	21,1%	20,6%	15,3%	100%
OCDE hors France, Allemagne, Canada et Etats-Unis		7,6%	35,9%	25,0%	12,9%	8,1%	10,6%	100%
CANADA et Etats-Unis		9,2%	29,4%	33,3%	15,8%	6,2%	6,2%	100%
TOTAL		*7,4%*	*18,5%*	*20,9%*	*20,2%*	*18,7%*	*14,3%*	*100%*

d'après INSEE pour la France et OCDE pour les autres pays

Si on compare, par ailleurs, la structure par âge de la population de 15-69 ans née en Algérie et résidente en France (*foreign-born*) à celle de la population native en France, on constate que les 'immigrés' sont proportionnellement plus nombreux pour le groupe d'âge de 35 à 69 ans. Ainsi, les politiques migratoires restrictives, plus particulièrement en France, semblent avoir figé les flux migratoires et conduit à une population d'immigrés relativement âgés du fait de son faible taux de renouvellement. 75% de la population algérienne immigrée résidente en France en 1999 était déjà installée avant 1984 tandis que 50% de celle-ci avaient moins de 21 ans à sa date d'arrivée.[108]

Ces disparités démographiques vont avoir une influence significative sur la structure du marché du travail et notamment sur les taux d'activité des immigrés. Cependant, une structure plus diversifiée de l'immigration algérienne émerge face aux restrictions imposées par la réglementation française et la diminution relative des coûts de la mobilité internationale et notamment du transport. La concentration de la destination-pays devient moins élevée chez les nouveaux immigrés algériens. Comme le montre la figure 13, ceux-ci, tout en continuant à privilégier la France mais à un degré relativement moindre, se dirigent beaucoup plus que leurs aînés vers l'Espagne, le Canada et les Etats-Unis.

Tableau 32 : Population immigrée algérienne selon le pays de destination et la durée de séjour

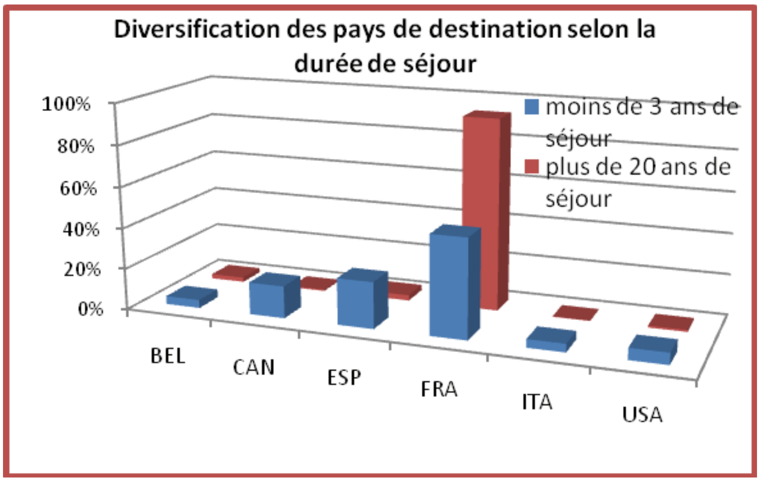
	moins de 3 ans de séjour	plus de 20 ans de séjour
BEL	1 599	6 401
CAN	6 295	2 015
ESP	9 060	7 800
FRA	19 235	262 755
ITA	1634	636
USA	2265	2 807
Total	40 088	287 144
Non déterminé	8 652	61 953

Source : Calculs des auteurs d'après OCDE et INSEE[109]

Figure 13 : Répartition des émigrés algériens selon la durée de séjour et pays de destination

108 Cf INSEE fiches techniques.

109 Pour le cas spécifique de la France, tous les rapatriés (de nationalité française à la naissance) ont une durée de 'séjour' de plus de 20 ans. Ils ont été soustraits du stock de migrants de nationalité française séjournant depuis plus de 20 ans reporté par l'OCDE. Par ailleurs, les non déterminés (22,6% pour le cas de la France) ont été répartis proportionnellement entre les différents postes.



Source : Cf Tableau 32 (ci-dessus)

Il semble donc que l'on assiste à une reconfiguration de la structure de destination des immigrés. Celle-ci est d'autant plus importante que la politique migratoire des nouveaux pays d'accueil se distingue à bien des égard de celle suivie jusque là par la France, principal pays de destination, et que la démographie des nouvelles catégories de migrants est différente avec ses conséquences sur leur niveau de participation au marché du travail et à leur potentialité d'épargne.

Emigration et capital humain

Les conséquences de la mobilité internationale croissante des populations sur les pays d'origine et de destination sont souvent liées à la 'transférabilité' du capital humain qui accompagne les migrations internationales. L'émigration des élites, particulièrement des PVD, est perçue comme une saignée du pays d'origine de sa ressource humaine même lorsque celle-ci n'est que partiellement exploitée localement. En fait, cette question focalise l'attention de l'ensemble des pays, tout autant les pays en développement (à un niveau dramatique pour le Ghana ou le Mozambique) que les pays émergents (Corée du Sud et Mexique) ou les pays développés comme l'Allemagne, l'Irlande ou le Portugal. Dans le cas de l'Algérie, la mobilité internationale de la population diffère, comme attendu, suivant le niveau d'éducation. On se propose dans ce qui suit, d'une part de voir du point de vue du pays de destination si les immigrés hautement qualifiés sont ou non positivement sélectionnés et, d'autre part, du point de vue des pays d'origine, d'évaluer par pays de destination le taux d'expatriation des élites d'origine algérienne qui est souvent utilisé pour exprimer l'intensité du *brain drain*.

Niveau d'instruction des immigrants, sélection et comparaison avec la population native du pays de destination

Pour savoir si les politiques migratoires, les stratégies d'entreprises du pays d'accueil ou le comportement du migrant lui-même sélectionnent des catégories particulières d'immigrés, on rapporte dans le tableau ci-dessous, par pays de destination, la répartition des immigrés ainsi que le taux de sélection des immigrés par niveau d'éducation[110].

110 Le taux de sélection des immigrants de niveau d'éducation i est le rapport du nombre d'immigrants de niveau d'éducation i au nombre total d'immigrants (i=Low, Medium, High)

Tableau 33 : Répartition des émigrés algériens par niveau d'éducation et taux de sélection

	Répartition des Immigrants par niveau d'éducation			Taux de sélection par niveau d'éducation			Niveau d'instruction de la population native (*)		
PAYS DE DESTINATION	Low Skill	Medium Skill	High Skill	Low Skill (%)	Medium Skill (%)	High Skill (%)	Low Skill (%)	Medium Skill (%)	High Skill (%)
FRA(**)	444.303	46.596	60.997	80,5	8,4	11,1	45,8	37,4	16,9
ESP	17.140	4.300	3.060	70,0	17,6	12,5	66,4	15,6	18,0
BEL	7.105	2.389	2.072	61,4	20,7	17,9	46,5	30,1	23,3
ITA	6.797	3.236	1.373	59,6	28,4	12,0	63,6	28,3	8,1
GBR	2.770	2.378	3.696	31,3	26,9	41,8	51,2	28,7	20,1
USA	1.486	3.403	5.591	14,2	32,5	53,3	20,3	52,2	27,4
CAN	2.295	4.410	10.730	13,2	25,3	61,5	31,6	36,9	31,5
TOTAL	481.896	66.712	87.519	75,8	10,5	13,8	36,9	40,7	22,3

Source : Calcul des auteurs d'après Docquier-Marfouk,(2006) INSEE et OCDE pour la France et OCDE pour les autres pays. Année 1999 pour la France e diverses années pour les autres pays.

(*) Cette population comprend les personnes résidentes et nées dans le pays considéré. En France, par exemple, les enfants d'immigrés dits 'beurs' font partie de cette catégorie de population.

(**) Une différence apparaît avec la base de données CARIM sur la répartition par niveaux d'éducation des immigrants d'origine algérienne en France en ce sens que celle-ci reporte, dans ce cas précis, les 'foreign-born' qui inclut comme nous l'avons vu les rapatriés d'Algérie après l'indépendance.

Ces statistiques nous montrent que 13,8% de l'immigration algérienne a un niveau de qualification supérieur[111]. Rapportée aux pays de destination, ces observations révèlent une sélection positive des émigrés hautement qualifiés à destination de la Grande Bretagne, des Etats-Unis et du Canada. Dans ce dernier pays, près de 62% des immigrants algériens ont un niveau d'instruction supérieur. De manière générale, on observe une distinction précise dans la nature des flux migratoires par niveau d'éducation entre d'une part les pays de l'Union européenne dont le taux de sélection des high skills dans leur ensemble ne dépasse pas 11,3% et la Grande Bretagne et les pays d'Amérique du Nord dont le taux moyen est supérieur à 54% Plus que l'aspect de politiques des entreprises ou d'auto-sélection, il semble que ce soit la nature des politiques migratoires mises en œuvre par les autorités qui joue le rôle prépondérant dans cette sélection des migrants qualifiés.

La même observation peut être faite lorsqu'on compare le niveau d'éducation des immigrés à celui de la population native (Tableau 33 ci-dessus colonne 8-10). En effet, on constate que la catégorie des migrants qualifiés est sous représentée dans les pays de l'Union européenne, hormis l'Italie. En

111 Les statistiques disponibles de l'INSEE ne donnent pas le niveau d'éducation des immigrés algériens en France. Le taux de sélection retenu pour ce pays est le taux moyen de l'UE-15 tels que reporté par Docquier et Marfouk (2006) pour le groupe d'âge (over 25). Compte tenu de la prépondérance de la destination France dans cet ensemble européen (90% environ), la marge d'erreur due à cette approximation est négligeable. Pour la classe complémentaire d'âge (15-24) des immigrés en France, on s'est basé sur les données de l'OCDE qui reporte correctement les données d'immigration pour ce groupe d'âge.

France particulièrement, la structure relative de la population immigrée est asymétrique et largement biaisée en faveur des immigrés non qualifiés.

En revanche, en GB et surtout aux Etats-Unis et au Canada, la proportion d'immigrants hautement qualifiés est supérieure à la moyenne nationale du pays d'accueil. Elle est deux fois plus importante que celle des natifs résidents.

Le brain drain : mythe ou réalité ?

Il est également utile de comparer la structure de la population émigrée à celle du pays d'origine pour voir dans quelle mesure l'Algérie serait affectée par une 'fuite des cerveaux' en tant que taux d'émigration particulièrement élevé des élites. Cette comparaison est cependant rendue difficile de par l'hétérogénéité des structures de qualification entre les pays. Toutefois, l'utilisation des tables de Barro-Lee (2000) qui se basent également sur la classification internationale ISCED 1976 de l'UNESCO permet l'appariement des niveaux d'éducation entre pays.

Tableau 34 : Taux d'émigration et brain-drain 1999

	Taux d'émigration			
	Low Skill	**Medium Skill**	**High Skill (Brain drain)**	**TOTAL**
Population résidente en Algérie (over 15ans) (1)	12 976 202	5 885 491	1 225 307	20 087 000
Attainment (over 15)(*)	64,6%	29,3%	6,1%	100%
Population émigrée d'origine algérienne (2)	481 896	66 712	87 519	636 127
Taux d'émigration *(brain drain)* (2/1)	3,7%	1,1%	**7,1%**	3,2%

(*) Source Barro-Lee (2000), ONS et Tableau ci-dessus.

Un taux d'émigration des diplômés de 7,1% est-il particulièrement important ? Comparée à certaines moyennes régionales (la moyenne en Afrique est de 10,4% d'après Docquier et Marfouk 2006) et au MENA (8,9%), l'Algérie n'apparaît pas, en 1999 qui marque le début du retour à une certaine stabilité, affectée outre mesure. Toutefois, ces résultats doivent être considérés avec prudence pour plusieurs raisons :

- A l'encontre de cette thèse qui minimise l'intensité du *brain drain*, le haut niveau d'agrégation de la classification adoptée ne permet pas de distinguer au sein même du niveau d'instruction supérieur la catégorie des 'élites' émigrées qui peut être une fraction beaucoup plus importante qu'elle n'apparaît dans ces statistiques. Ainsi, l'étude de Kangasniemi, Winters et Commander (2004) montre que les médecins indiens qui émigrent au Royaume-Uni proviennent pour la plupart d'institutions d'élite et sont plus qualifiés que les médecins installés dans le pays d'origine[112] à classification statistique identique.
- Par contre, Il faut voir que les taux d'émigration calculés plus haut surestiment selon nous les taux de sélection car le migrant peut avoir complété son niveau d'éducation dans le pays de destination

112 "Is the Medical Brain Drain Beneficial? Evidence from Overseas Doctors in the UK" Mari Kangasniemi, L. Alan Winters and Simon Commander Centre for Economic Performance London School of Economics and Political Science (2004).

auquel cas l'investissement d'éducation aura été une dépense dans le pays de destination[113]. Il ne peut pas de ce fait être rapporté à la population qualifiée résidente dans le pays d'origine et être associé à un *brain drain*. A strictement parler, le niveau d'éducation à prendre en compte doit être celui du migrant à son arrivée dans le pays d'accueil ; ce dont on ne dispose pas dans les bases de données[114].

- Il est parfois soutenu qu'un *brain drain* vaut encore mieux qu'un '*brain in the drain'* (Kapur, McHale, 2005, par exemple) en faisant référence au fait que ces élites, si elles restent dans leur pays d'origine, seront gaspillés et versées au chômage. Elles constitueraient ainsi une charge pour le pays d'origine. En fait, ce ne sont pas toujours les diplômés chômeurs qui émigrent. Souvent, ce sont des personnes hautement qualifiées *en exercice* et pour lesquels il y a une pénurie de compétence. Par ailleurs, le capital humain qu'ils portent, même faiblement utilisé, est un *potentiel* valorisable qui risque, par l'émigration, d'être irrémédiablement *perdu* pour le pays d'accueil.
- Enfin, il faut remarquer que dans le total de la population algérienne émigrée, 13,8% ont un niveau d'instruction supérieur (Tableau 33) alors que ce taux n'est que de 6,1% en Algérie (Tableau 34). Il y a donc une sélection positive des émigrés algériens au sens où la structure de la population qui opte pour l'émigration est plus fortement marquée par la prépondérance des *high skills* que la structure de la population algérienne résidente.

En conclusion, ces observations laissent penser à un biais de sélection positive ainsi qu'à un taux d'émigration assez élevé des personnes qualifiées, le rendement de l'émigration apparaissant relativement plus grand pour les groupes d'instruction du niveau du tertiaire. Il faut toutefois garder présent à l'esprit les deux biais éventuels de signe opposé que nous avons signalés: (i) les données sur-estiment le *brain drain* car une partie de cet accroissement du capital humain résulte d'un investissement réalisé par l'immigrant dans le pays d'accueil et (ii) d'un autre côté, ces statistiques sous-estiment l'émigration des élites qui ne peut être observée statistiquement qu'avec des données plus fines sur les niveaux de qualification supérieure.

L'analyse qui est présentée ci-dessus est en coupe et porte sur le stock d'émigrés observé en 1999 pour la France et pour diverses années pour les autres pays. Il serait utile cependant de voir les évolutions temporelles de la structure de l'émigration algérienne pour voir si, par exemple, le '*brain drain*' s'aggrave ou au contraire a tendance à se dissiper. Ne disposant pas de séries temporelles, nous avons observé la structure de l'émigration par qualification suivant la durée de séjour des émigrés[115]. Le tableau ci-dessous reporte les qualifications des émigrés suivant leur durée de séjour pour deux pays représentatifs, en l'occurrence, la France et le Canada :

Tableau 34 bis : Structure des qualifications par durée de séjour

Durée de séjour	**LOW SKILL**		**MEDIUM SKILL**		**HIGH SKILL**	
	France	CANADA	France	CANADA	France	CANADA
10 à 20 ans	58,4%	14,3%	28,5%	29,7%	13,0%	55,9%
5 à 10 ans	50,9%	11,4%	25,5%	21,3%	23,6%	67,3%
0 à 5 ans	50,6%	13,1%	25,9%	21,8%	23,5%	65,1%

Source : DOIC/ OCDE. Origine du temps : 1999 pour la France et 2000 pour le Canada.

113 Sur les incitations de l'immigrant à investir plus que la population native en capital humain dans le pays de destination, cf H. Orcutt Duleep et M. C. Regets :'Immigrants and Human-capital Investment' American Economic Review V89 N°2 1999

114 Les taux d'émigration reportés par l'OCDE sont également biaisés dans le cas spécifique de l'Algérie en ce que l'OCDE intègre dans le stock d'immigrants les 950.000 rapatriés français en 1962 à l'issue de la guerre d'indépendance.

115 On ne peut pas agréger les données de stock par pays celles-ci se rapportent à des années de recensement ou d'enquête différentes.

Tant pour le Canada que pour la France, on constate une rupture dans le profil de migration qu'on peut dater au cours des années 1989-1990 où la proportion des émigrés qualifiés connaît un saut important passant en France de 13% des émigrés arrivés entre 1979 et 1989 à 23,5% des arrivants entre 1989 et 1999. Toutefois, celle-ci ne semble pas connaitre de modifications significatives au cours de la dernière décennie 1989-1999 où le taux de sélection des *high skill* se stabilise autour de 23% en France et de 66% au Canada.

Les différentes caractéristiques démographiques de l'émigration évoquées ci-dessus (sexe, âge, durée de séjour*)* ainsi que le niveau d'éducation en tant que composante importante du capital humain vont avoir une influence directe sur le rapport de l'immigration algérienne au monde du travail. Il en est ainsi tant du taux d'activité que de la nature des emplois occupés et de leur qualification. Le tableau suivant reporte l'emploi en pourcentage de la population active, le taux de chômage ainsi que le taux d'activité de l'immigration algérienne par sexe dans les principaux pays d'accueil.

Tableau 35 : Emploi, chômage et activité des émigrés algériens par pays de destination

	Employés (en % de la pop. active)			**Taux de Chômage (en % de la pop. active)**			**Taux d'activité (*) (en %ge de la pop.)**		
PAYS DE DESTINATION	**Femmes**	**Hommes**	**Total**	**Femmes**	**Hommes**	**Total**	**Femmes**	**Hommes**	**Total**
FRA	70	75	74	30	25	26	47,4	82,7	67,9
ESP	75	82	81	25	18	19	53,4	86,6	78,5
BEL	56	72	66	44	28	34	41,0	64,3	53,7
ITA	77	87	85	23	13	15	43,1	86,1	73,0
GBR	84	80	81	16	20	19	42,1	74,5	65,7
USA	94	95	94	6	5	6	57,5	84,4	75,1
CAN	74	74	74	26	26	26	58,7	81,2	71,9
TOTAL (%ge)	71	76	75	29	24	25	47,8	82,4	68,4
TOTAL (niveau)	61 879	169 065	230 944	25 562	52 522	78 084	87 441	221 588	309 028

- Source : calculs des auteurs d'après diverses sources de l'INSEE et de l'OCDE.
- Pour la France, il s'agit uniquement de la population entre 25 et 59 ans. Pour les groupes d'âges de 25-30 ans et 55-59 ans, le taux d'activité a été approximé par celui de la moyenne, par genre, des pays du Maghreb.

- Pour les autres pays, la population considérée est celle d'âge 15-64 ans.

(*) Rapport de la population active à l'effectif total.

Le chômage

Hormis les Etats-Unis, le taux de chômage de la population immigrée (25% en moyenne) est constamment à deux chiffres et est particulièrement élevé en Belgique et en France. Malgré la politique d'immigration « choisie » du Canada, le chômage reste très important rendant ainsi peu visible l'objectif recherché par la politique migratoire de ce pays. Le chômage frappe particulièrement la catégorie féminine mais cette discrimination est localisée dans les pays de l'Union européenne particulièrement en Belgique et en Italie.

Le taux de chômage des immigrés d'origine algérienne est plus élevé dans les pays de destination que dans leur pays d'origine. Certes, le chômage a atteint en Algérie 29% en 1999. Toutefois dans une perspective dynamique, alors que le taux de chômage a chuté en Algérie en passant à 24% puis à 15,3% respectivement en 2003 et 2005, celui des immigrés en France reste supérieur à 25% en 2002 alors que le taux de chômage des étrangers dans leur ensemble en France n'a chuté que de trois points entre 2000 et 2005. Aussi, si l'écart entre les revenus peut constituer une variable explicative du choix de l'émigration, cette divergence de revenus -que nous avons mise en évidence plus haut (section 3)- doit cependant être pondérée par la probabilité du chômage – l'exposition plus forte au risque du chômage en France- d'autant plus que celui-ci est particulièrement sévère dans le cas de l'immigration algérienne. Par cette 'correction', la divergence entre les revenus *espérés* sera plus réduite et pourrait ne plus être aussi discriminante dans la décision d'émigrer.

L'activité

Par contre, le taux d'activité plus élevé des femmes immigrées dans les pays de destination montre que le contexte social joue un rôle significatif dans la participation des femmes au marché du travail. Au-delà des limites inhérentes aux comparaisons internationales, ce taux, qui est en moyenne de 47% dans les pays de destination, est plus de cinq fois plus élevé que le taux observé en Algérie (8,6%). Il est vrai que cette causalité, pour être statistiquement établie, nécessite de contrôler la relation par les autres variables explicatives telles que le niveau d'éducation, la nationalité, la position sociale pour respecter la clause de 'toute chose égale d'ailleurs'. Toutefois l'importance de l'écart laisse supposer un lien spécifique significatif (hétérogénéité des pays) passant par l'environnement social dans lequel la femme évolue.

L'emploi

La répartition à un niveau très agrégé (niveau 1 de la nomenclature française) de la population employée en France par catégories professionnelles ne permet pas d'avoir une idée fine de celle-ci notamment pour les professions hautement qualifiées. Par ailleurs, une comparaison entre pays de cette répartition est rendue difficile du fait des différences entre les nomenclatures nationales. La France qui recense les activités suivant la nomenclature des Professions et des Catégories Socioprofessionnelles (PCS) adopte pour des activités importantes des logiques différentes de celles de la nomenclature internationale CITP (ISCO). Toutefois, pour l'Algérie, les postes les plus importants peuvent être assez aisément appariés.[116]

116 La table de passage que nous avons retenue est la suivante :

PCS	1	2	3	4	5	61	62
CITP (ISCO88)	62+92	12+13	1(hormis 12+13) +2	3	4+5+91	61+7+8	93

Tableau 36 : Répartition des émigrés algériens par catégories professionnelles et pays de destination (en pourcentage de la population employée).

PCS		FRA	ESP	ITA	GBR	CAN	TOTAL
1	**Agriculteurs**	0	0	0	0	0	0
2	**Artisans, commerçants et chefs d'entreprises**	7	5	22	17	40	16
3	**Cadres et professions intellectuelles supérieures**	7	3		18		
4	**Professions intermédiaires**	15	4	16	8	14	14
5	**Employés**	30	38	19	41	29	30
6	**Ouvriers**	41	50	43	15	17	40
61	**dont Ouvriers 61**	*25*	*37*	*43*	*13*	*15*	*25*
61	**dont Ouvriers 62**	*16*	*13*		*3*	*2*	*15*
	TOTAL	100	100	100	100	100	100

Source : d'après INSEE et OCDE

Près de la moitié des immigrants travaillant en France, Espagne et Italie sont des ouvriers -dont près du tiers sont non qualifiés- alors que cette proportion n'est que de 15% à 17% en Grande Bretagne ou au Canada. En revanche, et bien qu'on ne dispose pas pour la catégorie 2 d'un indicateur de la taille des entreprises, on peut observer que les emplois exercés par les immigrants d'origine algérienne au Canada et en Grande Bretagne concernent des professions supérieures (2 et 3). En pourcentage, ces emplois représentent plus du double de la moyenne dans la population totale employée.

Du point de vue des secteurs d'activité, ce sont principalement les secteurs des services qui occupent, avec 74% en France, les émigrés d'origine algérienne et plus spécifiquement le domaine des services aux entreprises ainsi que celui de l'éducation, de la santé et de l'action sociale.

5.2 Elément pour l'analyse de l'impact des flux migratoires sur les marchés du travail nationaux

Cerner l'ensemble des impacts possibles de l'immigration sur l'économie d'origine, c'est-à-dire la relation migration retour/développement du point de vue du pays d'origine est une tâche difficile. On a tenté toutefois de synthétiser les impacts possibles sur le marché du travail à travers le tableau suivant qui considère la migration retour dans ses différents aspects de flux de *worker-returner* (force de travail L), de transfert de capital financier (K), de capital social (S) ainsi que de transfert de capital humain (H). Mais, il haut observer que (i) certains des canaux ne sont pas spécifiques à la migration retour dès lors que le flux ou le stock n'est pas 'porté' par le migrant, (ii) certains impacts dépendent de la nature de la migration (comme le niveau des *remittances* et la nature permanente ou temporaire de la migration), (iii) la valeur du capital social ou humain transféré par le migrant n'est pas invariante mais se trouvera altérée par le déplacement de ce capital dans un pays à niveau de développement différent.

Tableau 37 : Tableau synoptique des impacts attendus de la migration sur le marché du travail

Nature de l'impact sur le marché du travail / Nature du transfert via la migration retour	Informalisation	Participation au marché du travail	Equilibre du marché du travail	Structure des qualifications sur le marché du travail	Effets externes
Flux des worker-returnee (L)			Augmentation de la demande de travail (*worker-returnee*)		
Capital financier (K) *(entrepreneur-returnee)*	*Remittances* et alimentation du black market	Taux de participation des femmes (à travers les revenus)	Augmentation de l'offre de travail à travers les *remittances* investis (Entrepreneurs-returnee)		
Capital Humain (H)				a) incitation à l'accumulation de capital humain (Stark) b) migrants de retour qualifiés (Cassarino) c) *brain drain*	Externalité positive sur l'économie dans son ensemble (Lucas)
Social (S)					Densification des réseaux vers l'économie globale

5.2.1 Impact sur l'emploi

Ainsi, le premier impact de la migration de retour porte sur l'équilibre du marché du travail. La migration de retour à un impact positif sur la demande de travail lorsqu'il s'agit d'un retour de travailleurs émigrés ainsi qu'un impact sur l'offre de travail lorsque cette migration retour s'accompagne d'une création d'entreprises. On ne dispose pas de données permettant de connaître la proportion d'investisseurs dans la population d'émigrés de retour en Algérie. Cependant, les recensements réalisés en 1987 et 1998 révèlent qu'environ 2600 émigrés retournent annuellement en Algérie[117]. L'enquête réalisée dans le cadre du projet MIREM a révélé par ailleurs que sur un échantillon de 332 migrants de retour en Algérie, 37 étaient des entrepreneurs soit un pourcentage de 11% pour cette catégorie. Ceci montre que l'impact de la migration de retour peut être estimé à environ 300 créations d'entreprises par an sur la base des flux des migrants de retour observés entre 1987-1998. Ceci reste loin des 25.000 entreprises annuellement créées en Algérie. Dès lors, il semble difficile de dire que la migration retour peut significativement affecter le marché du travail par la création d'entreprises et l'offre de travail qu'elle peut générer dans le pays d'origine.

117 Musette (2007) et Gubert, Nordman (2008).

5.2.2 Impact sur la disponibilité de travailleurs qualifiés
Un autre aspect de l'impact de la migration sur le marché du travail est lié au transfert de capital humain qui accompagne les migrations internationales. Nous avons déjà tenté d'évaluer ci-dessus l'importance du *brain drain* en Algérie. La Mission d'autoévaluation par les pairs (MAEP 2007) instituée dans le cadre du NEPAD s'est également préoccupée de la question de la fuite des cerveaux en Algérie. Elle indique que les cadres, intellectuels et scientifiques qui ont quitté le pays depuis 1990 sont estimés à près de 40 000. « A l'origine, de nombreux algériens ont quitté le pays à cause de la dégradation des conditions de vie et de travail à partir du milieu des années 1980, ainsi que de l'insécurité qui a déstructuré la société dans son ensemble ». Ce rapport d'autoévaluation impute à « l'avènement du terrorisme mené surtout contre les intellectuels, journalistes, artistes, scientifiques et universitaires » l'amplification de l'exode à partir des années 1990 mais considère « qu'aujourd'hui, avec le retour à la normalité et l'ouverture de l'économie aux entrepreneurs privés, on observe l'exode des fonctionnaires de la Fonction Publique vers le secteur privé». Notons que le départ de la Fonction publique vers le secteur privé est parfois une étape intermédiaire vers l'émigration hors du pays du fait de la flexibilité de l'emploi dans le privé et des opportunités qui se présentent aux personnes employés dans les entreprises étrangères notamment. La Mission recommande aux autorités de « mettre en place une stratégie d'utilisation des cadres de la diaspora algérienne pour combler le déficit de compétences ». Cependant, cette vision a peu de chances de donner des résultats. Sans vraiment croire dans l'immédiat à une migration de retour massive des diplômés établis à l'étranger, il s'agirait plutôt de réfléchir aux mesures et dispositions à prendre pour éviter leur rupture totale et irréversible avec le pays en les associant à des réseaux (enseignement, conseil, partenariats)[118].

5.2.3 Impact sur les perspectives de travail pour les femmes et les jeunes
L'étude réalisée par Hammouda (2008a) permet de voir comment les jeunes se représentent les migrations et projettent leur avenir à travers elle. L'auteur a utilisé les données d'une enquête menée en 2002 sur un échantillon de 3.268 jeunes célibataires (15-19 ans) des deux sexes[119] dont 36,9% envisageaient d'émigrer. Les résultats permettent d'avancer que la propension à migrer dépend en premier lieu de l'appartenance à un bassin de migration (effet d'agglomération), du sexe (les hommes étant plus enclins à vouloir migrer), le niveau d'instruction (le désir de migration croît avec le niveau d'instruction), l'existence de conflit avec les parents, les difficultés rencontrées pour se marier, le type de logement (promiscuité dans les appartements) et enfin l'âge (le désir de migration augmentant avec l'âge mais à un rythme décroissant). Pour l'auteur, le coût élevé de l'émigration explique qu'elle attire surtout des travailleurs diplômés et que les chômeurs en soient exclus "de fait". Par ailleurs, il oppose les stratégies « individuelles » des jeunes travailleurs aux stratégies « collectives » des étudiants, qui commencent leur trajectoire migratoire par le biais d'une formation complémentaire pour laquelle ils sont obligés de mobiliser des ressources familiales. Cependant, le résultat le plus original de cette étude est qu'à aucun moment la variable « situation individuelle » reflétant la position de la personne sur le marché du travail (occupé, chômeur ou inactif), n'apparaît comme significative. En fait, la jeunesse de l'effectif de l'échantillon (jeunes de 15-19 ans), qui correspond à une population qui majoritairement n'est pas encore entrée sur le marché du travail et dépend largement des parents, nous semble être la principale explication du poids de la variable "formation" par rapport à l'emploi ainsi que de l'importance des « problèmes psychologiques et affectifs » dans les réponses. Pour permettre une connaissance de la propension des jeunes algériens à migrer, l'échantillon devrait certainement être élargi à une population plus vaste pour être représentatif (15-29 ans).

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118 Dans plusieurs pays, les algériens diplômés s'organisent en associations. Citons le cas du Forum des Compétences Algériennes en Suisse, créée en 2003 à Genève, qui rassemble des experts (ingénieurs, professeurs etc) dans différents domaines scientifiques et techniques exerçant en Suisse. Le FCAS organise chaque année à Alger un Forum International de la Finance qui en est à sa cinquième édition.

Dans la même perspective, le site http://algerianinventors.org/en/Inventeurs se propose de recenser les inventeurs algériens à l'étranger ainsi que leurs Inventions. Cette Banque de données comprend plus de 300 inventeurs - dont 12% de femmes -détenant plus de 1500 brevets d'invention, ce qui représente une moyenne de 5 brevets par inventeur.

119 Il s'agit du volet « jeunesse » - dont le questionnaire comportait deux questions sur le désir de migration et ses raisons - de l'enquête sur la santé de la famille (PapFam, 2002) réalisée par l'ONS et le ministère de la Santé, de la population et de la réforme hospitalière, dans le cadre d'un protocole d'accord entre le Gouvernement algérien et la Ligue des Etats Arabes.

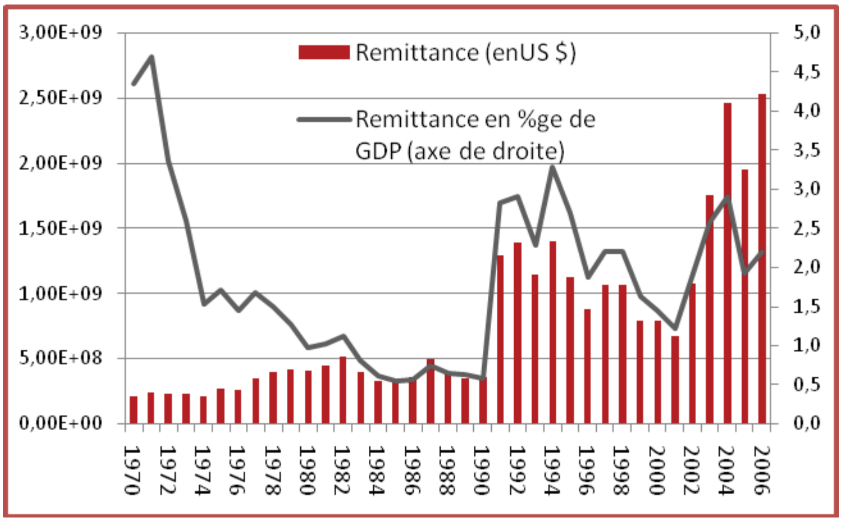
5.2.4 Les transferts de fonds des émigrés et leur impact sur les marchés du travail

Les *remittances* -qui sont symptomatiques des effets globalement positifs de la migration sur le pays d'origine-, ont été pendant longtemps négligeables dans leur niveau officiel saisi par la balance de paiement. L'année 1991 marque un regain indiscutable des *remittances* qui ont vu leur niveau se multiplier par près de quatre passant de 350 millions à près de 1,3 milliards de dollars US.

Certes, à partir de cette date, on observe des fluctuations importantes des niveaux de transfert et une baisse inquiétante pour l'Algérie vers la fin de la décennie où les *remittances* sont inférieurs à ceux vers la Tunisie. Toutefois, à partir de 2001, une hausse exceptionnelle fait culminer les transferts des migrants algériens vers un pic de 2,6 milliards de dollars en 2006.

La figure ci-dessous reproduit en niveau et en pourcentage du PIB les transferts courants des émigrés installés depuis plus d'un an ainsi que les salaires des résidents algériens de moins de un an enregistrés dans la Balance de paiements. Le montant de ces transferts a ainsi été en 1999 de 1200 dollars par immigré d'origine algérienne résident dans un pays de l'OCDE. Si on rapporte ces fonds transférés à la *population employée*, on constate que le travailleur immigré transfère annuellement en Algérie en moyenne 3200 dollars environ.

Figure 14 : Evolution des *remittances* de l'émigration algérienne



Source: World Development Indicators 2008 (Banque mondiale)

Avec la libéralisation de l'économie et les mesures d'ajustement mises en œuvre à partir des années 90, le *black market premium* a été réduit incitant les immigrés à augmenter le volume de leur transfert et à utiliser davantage les canaux de transfert officiels. L'utilisation de ces flux en Algérie dans son aspect consommation versus investissement dans le pays de retour peut être importante du point de vue de la contribution de ces flux à la croissance[120]. On ne dispose pas toutefois d'une telle catégorisation pour l'Algérie. Il importe cependant de constater que ces flux sont constamment supérieurs aux flux d'investissements directs étrangers[121] alors même qu'ils sont certainement largement sous évalués n'incluant pas les transferts via les circuits informels.

120 Il ne s'agit pas de soutenir que l'utilisation de ces transferts pour la consommation ou l'acquisition de logements est improductive. Il est vrai que l'utilisation des transferts d'argent à l'investissement productif a des effets directs sur l'économie réceptrice. Toutefois, l'augmentation de la consommation ou des investissements en logement a également un impact économique indirect non négligeable à travers l'effet multiplicateur.

121 Cf Muzette 2007

5.3 Options de politiques migratoires

A l'issue de cette étude, les recommandations suivantes peuvent être préconisées:

1- Attirer le capital humain : L'incitation au retour les émigrés *high skilled* passe par la mise en œuvre d'incitations matérielles et immatérielles et la création des conditions scientifiques et technologiques de leur accueil (création d'instituts de recherches, mise en place de pôles technologiques) pour valoriser la préférence pour le pays d'origine.

   1. Cependant, le retour définitif au pays peut s'avérer contre productif pour l'immigrant lui-même, car coupé de son milieu scientifique, il risque de voir son capital humain se dévaloriser. Aussi, s'agit-il également de réfléchir à des dispositifs visant à favoriser la participation des élites émigrées à l'économie algérienne sans que cela passe nécessairement par un retour définitif.

   2. Par ailleurs, la politique migratoire ne doit pas se limiter à la gestion des flux des émigrés diplômés. Elle doit également concerner la main d'œuvre qualifiée en pénurie sur le marché du travail, notamment dans le BTPH et les grands travaux d'infrastructure.

2- *Attirer le capital financier*: Il s'agit de créer des succursales de banques algériennes pour faciliter les transferts. Ces banques ne doivent pas viser seulement à capter l'épargne des émigrés mais doivent également offrir des services (crédits immobiliers, crédits à l'investissement, conseils...). Toute une expertise peut être mise en place pour allier la mobilisation de l'épargne avec son placement dans des investissements productifs privés.

3- *Préserver le système de binationnalité* et de résidence flexible pour préserver le capital social et ne pas distendre le lien entre l'immigré de longue date et le pays d'origine.

4- Etendre à l'émigration le champ de la régulation du marché du travail en mettant en place des dispositifs (notamment systèmes d'informations et bases de données) pour *mettre en réseau* les compétences et les employeurs locaux et expatriés.

5- *L'importance de l'environnement de l'investissement* : A l'instar de tout transfert de capital (que ce soit les *remittances* ou l'investissement direct étranger) dont il est attendu qu'il contribue au développement de l'économie réceptrice à travers notamment les effets externes dont il peut être à l'origine, seule une économie permissive de croissance et qui ne soit pas génératrice de coûts injustifiés peut bénéficier des différentes formes de capitaux transférés notamment par la migration de retour. Cet oubli peut conduire à des méprises ou et à des déceptions (*disappointment*)[122], sinon à des politiques économiques erronées. Cette question pose en fait le problème du sens de causalité dans la relation : migration retour/croissance qui est certainement bidirectionnel.

6- Cette étude a permis de mettre en évidence l'importance et la complexité de deux phénomènes : l'informel (secteur informel et emploi informel) d'une part, et les migrations irrégulières (immigration et émigration) d'autre part. Nous avons supposé un lien fort entre ces phénomènes que nous avons essayé de décrire avec les données dont nous disposions. Mais nous n'avons pas pu en évaluer les impacts réciproques, faute de données. Aussi, préconisons-nous la promotion d'études et d'enquêtes qui lient les deux phénomènes.

7- Par ailleurs, il s'agit de rompre avec une vision exclusivement négative à la fois de l'informel et des migrations irrégulières et de voir dans quelle mesure ces deux phénomènes résultent de rigidités institutionnelles en Algérie et dans les pays partenaires (notamment sur la régulation du marché du travail et des flux migratoires) et comment les aborder de manière à valoriser le potentiel qu'ils recèlent en termes d'activité économique et de contribution au développement.

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122 Ainsi, on 'regrette' souvent que les remittances soient utilisées pour la consommation ou l'investissement en logement qu'en 'conséquence', ils ne contribuent pas suffisamment à la croissance.

8- Enfin, il est utile dans ce cadre de rappeler que la migration fait intervenir trois acteurs majeurs avec leurs propres objectifs, contraintes et stratégies : le pays de destination, le pays d'accueil et le migrant lui-même. Une stratégie, pour être gagnante, ne doit pas ignorer l'un quelconque de ces acteurs. A titre d'exemple, une politique de migration retour peut recevoir l'adhésion des pays de destination et d'origine quand à son application. Toutefois, si elle heurte l'intérêt du migrant, elle se résoudra par un accroissement de l'immigration irrégulière. Une approche 'intégrée' devrait ainsi non seulement prendre en compte les effets de la migration sur les pays d'origine et d'accueil mais également connaître et intégrer dans son architecture les déterminants de l'émigration et les avantages et coûts pour l'individu qui lui sont liés. C'est cet 'oubli' qui a été la cause de l'échec des politiques d'incitation au retour des émigrés algériens préconisées tant du côté algérien que français durant les années 1970-1980.

ANNEXE 1

Les droits et devoirs des travailleurs dans les Constitutions de 1976, 1989, 1996

Constitution de 1976

Est qualifié de travailleur toute personne qui vit du produit de son travail qu'il soit intellectuel ou manuel et n'emploie pas à son profit d'autres travailleurs dans son activité professionnelle.

Chapitre II: Du Socialisme

Art. 11.__ Le socialisme se propose d'assurer le développement du pays, de faire des travailleurs et des paysans des producteurs conscients et responsables, d'établir la justice sociale et de favoriser l'épanouissement citoyen.

Art. 23.__ Les formes socialistes de gestion des entreprises constituent un facteur d'émancipation des travailleurs.

Ceux-ci, par leur participation a la gestion, assument des responsabilités réelles en tant que producteurs conscients de leurs droits et de leurs devoirs.

Art. 24.__ La société est fondée sur le travail. Elle abolit radicalement le parasitisme. Elle est régie par le principe socialiste : (De chacun selon ses capacités, à chacun selon son travail) Le travail est la condition essentielle du développement du pays et la source par laquelle le citoyen assure ses moyens d'existence.

Il est assigne en tenant compte des exigences de l'économie et de la société, du choix du travailleur, de même que des aptitudes et de la qualification de celui-ci.

Art. 59.__ Le droit au travail est garanti conformément à l'article 24 de la Constitution.

Le travailleur assume sa fonction productive comme un devoir et un honneur.

Le droit de prendre une part du revenu national est lie à l'obligation de travailler.

Les rémunérations, fondées sur le principe (A travail égal, salaire égal), sont détermines en fonction de la qualité et de la quantité du travail effectivement accompli.

La recherche d'une meilleure productivité est un objectif permanent dans la société socialiste.

L'encouragement au travail et à la productivité peut être assure par la mise en oeuvre de stimulants d'ordre moral et par un système approprie d'intéressement matériel collectif et individuel.

Art. 60.__ Le droit syndical est reconnu à tous les travailleurs ; il s'exerce dans le cadre de la loi.

Art. 61.__ Les relations de travail dans le secteur socialiste sont régies par les dispositions légales et réglementaires relatives aux formes socialistes de gestion.

Dans le secteur prive, le droit de grève est reconnu. Son exercice est réglemente par la loi.

Art. 62.__ L'Etat garantit le droit à la protection, à la sécurité et à l'hygiène dans le travail.

Art. 63.Le droit au repos est garanti.

La loi en détermine les modalités d'exercice.

Art. 64.__ Dans le cadre de la loi, l'Etat assure les conditions de vie des citoyens qui ne peuvent pas encore, qui ne peuvent plus ou ne pourront jamais travailler.

Constitution de 1989

Article 48. - L'égal accès aux fonctions et aux emplois au sein de l'Etat est garanti à tous les citoyens, sans autres conditions que celles fixées par la loi.

Article 52. - Tous les citoyens ont droit au travail.

Le droit à la protection, à la sécurité et à l'hygiène dans le travail est garanti par la loi.

Le droit au repos est garanti ; la loi en détermine les modalités d'exercice.

Article 53. - Le droit syndical est reconnu à tous les citoyens.

Article 54. - Le droit de grève est reconnu, il s'exerce dans le cadre de la loi.

Celle-ci peut en interdire ou en limiter l'exercice dans les domaines de Défense nationale et de sécurité, ou pour tous services ou activités publics d'intérêt vital pour la communauté.

Article 56. - Les conditions de vie des citoyens qui ne peuvent pas encore, qui ne peuvent plus ou ne pourront jamais travailler, sont garanties.

Article 115. - L'Assemblée populaire nationale légifère dans les domaines que lui attribue la Constitution. Relèvent également du domaine de la loi :

19) Les règles générales relatives au droit du travail et à la Sécurité sociale (dans la **Constitution de 1996**, il a été ajouté : et à l'exercice du droit syndical)

ANNEXE 2
Liste des conventions de l'OIT ratifiées par l'Algérie

C. 3	Convention (n° 3) sur la protection de la maternité, 1919	19.10.1962
C. 6	Convention (n° 6) sur le travail de nuit des enfants (industrie), 1919	19.10.1962
C. 11	Convention (n° 11) sur le droit d'association (agriculture), 1921	19.10.1962
C. 13	Convention (n° 13) sur la céruse (peinture), 1921	19.10.1962
C. 14	Convention (n° 14) sur le repos hebdomadaire (industrie), 1921	19.10.1962
C. 17	Convention (n° 17) sur la réparation des accidents du travail, 1925	19.10.1962
C. 18	Convention (n° 18) sur les maladies professionnelles, 1925	19.10.1962
C. 19	Convention (n° 19) sur l'égalité de traitement (accidents du travail), 1925	19.10.1962
C. 24	Convention (n° 24) sur l'assurance-maladie (industrie), 1927	19.10.1962
C. 29	Convention (n° 29) sur le travail forcé, 1930	19.10.1962
C. 32	Convention (n° 32) sur la protection des dockers contre les accidents (révisée), 1932	19.10.1962
C. 42	Convention (n° 42) (révisée) des maladies professionnelles, 1934	19.10.1962
C. 44	Convention (n° 44) du chômage, 1934	19.10.1962
C. 56	Convention (n° 56) sur l'assurance-maladie des gens de mer, 1936	19.10.1962
C. 63	Convention (n° 63) concernant les statistiques des salaires et des heures de travail, 1938	19.10.1962
C. 68	Convention (n° 68) sur l'alimentation et le service de table (équipage des navires), 1946	19.10.1962
C. 69	Convention (n° 69) sur le diplôme de capacité des cuisiniers de navire, 1946	19.10.1962
C. 70	Convention (n° 70) sur la sécurité sociale des gens de mer, 1946 Convention pas en vigueur	19.10.1962
C. 71	Convention (n° 71) sur les pensions des gens de mer, 1946	19.10.1962
C. 73	Convention (n° 73) sur l'examen médical des gens de mer, 1946	19.10.1962
C. 74	Convention (n° 74) sur les certificats de capacité de matelot qualifié, 1946	19.10.1962
C. 77	Convention (n° 77) sur l'examen médical des adolescents (industrie), 1946	19.10.1962
C. 78	Convention (n° 78) sur l'examen médical des adolescents	19.10.1962

	(travaux non industriels), 1946	
C. 80	Convention (n° 80) portant révision des articles finals, 1946	19.10.1962
C. 81	Convention (n° 81) sur l'inspection du travail, 1947	19.10.1962
C. 87	Convention (n° 87) sur la liberté syndicale et la protection du droit syndical, 1948	19.10.1962
C. 88	Convention (n° 88) sur le service de l'emploi, 1948	19.10.1962
C. 89	Convention (n° 89) sur le travail de nuit (femmes) (révisée), 1948	19.10.1962
C. 91	Convention (n° 91) sur les congés payés des marins (révisée), 1949	19.10.1962
C. 92	Convention (n° 92) sur le logement des équipages (révisée), 1949	19.10.1962
C. 94	Convention (n° 94) sur les clauses de travail (contrats publics), 1949	19.10.1962
C. 95	Convention (n° 95) sur la protection du salaire, 1949	19.10.1962
C. 97	Convention (n° 97) sur les travailleurs migrants (révisée), 1949 *A exclu les dispositions de l'annexe II*	19.10.1962
C. 98	Convention (n° 98) sur le droit d'organisation et de négociation collective, 1949	19.10.1962
C. 99	Convention (n° 99) sur les méthodes de fixation des salaires minima (agriculture), 1951	19.10.1962
C. 100	Convention (n° 100) sur l'égalité de rémunération, 1951	19.10.1962
C. 101	Convention (n° 101) sur les congés payés (agriculture), 1952	19.10.1962
C. 105	Convention (n° 105) sur l'abolition du travail forcé, 1957	12.06.1969
C. 108	Convention (n° 108) sur les pièces d'identité des gens de mer, 1958	13.08.1991
C. 111	Convention (n° 111) concernant la discrimination (emploi et profession), 1958	12.06.1969
C. 119	Convention (n° 119) sur la protection des machines, 1963	12.06.1969
C. 120	Convention (n° 120) sur l'hygiène (commerce et bureaux), 1964	12.06.1969
C. 122	Convention (n° 122) sur la politique de l'emploi, 1964	12.06.1969
C. 127	Convention (n° 127) sur le poids maximum, 1967	12.06.1969
C. 135	Convention (n° 135) concernant les représentants des travailleurs, 1971	6.06.2006
C. 138	Convention (n° 138) sur l'âge minimum, 1973 *Age minimum spécifié: 16 ans*	30.04.1984
C. 142	Convention (n° 142) sur la mise en valeur des ressources humaines, 1975	26.01.1984

C. 144	Convention (n° 144) sur les consultations tripartites relatives aux normes internationales du travail, 1976	12.07.1993
C. 147	Convention (n° 147) sur la marine marchande (normes minima), 1976	27.06.2006
C. 150	Convention (n° 150) sur l'administration du travail, 1978	26.01.1984
C. 155	Convention (n° 155) sur la sécurité et la santé des travailleurs, 1981	6.06.2006
C. 167	Convention (n° 167) sur la sécurité et la santé dans la construction, 1988	6.06.2006
C. 181	Convention (n° 181) sur les agences d'emploi privées, 1997	6.06.2006
C. 182	Convention (n° 182) sur les pires formes de travail des enfants, 1999	9.02.2001
Dénonciation (du fait de la ratification de la convention n° 91)		
C. 72	Convention (n° 72) des congés payés des marins, 1946 Dénoncée le 14.09.1967	19.10.1962
Dénonciation (du fait de la ratification de la convention n° 138)		
C. 10	Convention (n° 10) sur l'âge minimum (agriculture), 1921 Dénoncée le 30.04.1984	19.10.1962
C. 58	Convention (n° 58) (révisée) sur l'âge minimum (travail maritime), 1936 Dénoncée le 30.04.1984	19.10.1962
Dénonciation (du fait de la ratification de la convention n° 167)		
C. 62	Convention (n° 62) concernant les prescriptions de sécurité (bâtiment), 1937 Dénoncée le 6.06.2006	19.10.1962
Dénonciation (du fait de la ratification de la convention n° 181)		
C. 96	Convention (n° 96) sur les bureaux de placement payants (révisée), 1949 Dénoncée le 6.06.2006 *A accepté les dispositions de la partie II*	19.10.1962

Source: International Labour Standards Department, listing generated by APPLIS on 9 Mar 2009.

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Chapter III – National Background Paper

Labour Markets Performance and Migration Flows in TUNISIA

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1. Offre de travail: Etat des lieux et prospective

1.1 Dynamique démographique et prospective

1.1.1 Etat des lieux: 1994 – 2007 [TAB 1]

La population totale en 2007 en Tunisie s'élevait à 10,2 millions contre 8,8 millions en 1994; elle s'est accrue au rythme annuel de 1% depuis 2004. La décélération par rapport à la période 1994-99 (1,4%) et sa stabilisation par la suite à 1% résultent de la baisse de l'indice synthétique de fécondité (ISF) qui est passé de 2,9 à 2,04 entre 1994 et 2007.

Tableau 1 - Evolution de l'ISF, de la population et de la population d'âge actif et du taux d'activité, 1994-2007

	1994	1999	2004	2005	2006	2007
ISF	2,9	2,09	2,08	2,04	2,03	2,04
Population	8814,5	9455,9	9932,4	10029	10127,9	10225,1
% croissance		*1,4%*	*1,0%*	*1,0%*	*1,0%*	*1,0%*
Population d'age actif	5727,4	6522	7268,9	7382,7	7525,9	7676,7
% par rapport à la population	*65%*	*69%*	*73%*	*74%*	*74%*	*75%*
Taux d'activité	45,30%	45,30%	45,80%	46,30%	46,60%	46,80%
Hommes	69,10%	67,90%	67,80%	68,60%	68,50%	68,80%
Femmes	21,40%	22,80%	24,20%	24,40%	25%	25,30%

Source: INS

La population d'âge actif (15 ans et plus) est passée de 5,7 millions en 1994 à 7,6 millions en 2007 et sa croissance annuelle moyenne, tout en ayant connu une baisse (2,6% entre 1994-1998, à 2%en 2007) est deux fois supérieure à celle de la population totale; ainsi le poids de la population d'âge actif est passé de 65% en 1994 à 75% en 2007 [**TAB 1**].

Le taux d'activité: quant à lui a augmenté de 1,5 points entre 1994 et 2007 en passant de 45,3% à 46,8%[123]. Pour les hommes, la tendance est à une très légère baisse 69,1% en 1994 et 68,8% en 2007, alors que pour les femmes un gain de prés de 4 points a été obtenu (21,4% en 1994 et 25,3% en 2007) tout en étant, comparativement à d'autres régions au monde, relativement bas [**TAB 1**].

Le taux d'activité par tranche d'âge en 2007 [TAB 2]. Pour les 15-24 ans: il est de 32,5% pour l'ensemble des 2 sexes (43,1% pour les hommes, et 21,9% pour les femmes) il est à son maximum 65,4% (90,2% pour les hommes et 41,8% pour les femmes) pour la tranche d'âge 23-34ans, il est de 63% pour la tranche d'âge 35-44 ans (90,5% pour les hommes, et 31,6% pour les femmes). Le taux d'activité diminue par la suite 55,4% pour la tranche d'âge 45-54ans (90,5% pour les hommes et 20,1% pour les femmes) et à 31,5% pour celui de 55 à 64ans et seulement 11,9% pour les 65 ans et plus.

123 Ces taux restent nettement inférieurs à ceux enregistrés en Amérique du Sud 73% et en Asie 82%.

Tableau 2 - Taux d'activité par âge et par sexe (2007)

Total	Hommes	Femmes	Ensemble
15-24	43,1	21,9	32,6
25-34	90,2	41,8	65,4
35-44	96,5	31,6	63
45-54	90,5	20,1	55,4
55-64	54,6	9,7	31,5
65 et +	20,4	3,3	11,9
Ensemble	**68,8**	**25,3**	**46,8**

Source: Enquête sur l'emploi de 2007, INS

Cette baisse est sensible pour les hommes où les taux d'activité tombent à 54,6% et 20,4% mais aussi et fortement pour les femmes 9,7% et 3,3% respectivement pour les tranches d'âge 55-64 ans et 65 ans et plus.

La population active: a quant à elle évolué à un rythme rapide et croissant. Evaluée à près de 3,6 millions en 2007, contre 2,6 millions environ en 1994, soit une croissance annuelle moyenne de 2,1% entre 1994 et 2004 et de 2,8% entre 2004 et 2007, la part des femmes dans la population active a augmenté de 3,7 points passant de 23,6% à 27,3%, ainsi la croissance annuelle moyenne des femmes actives a été plus soutenue comparativement 3,6% en moyenne contre 2,2% pour les hommes entre 1994 et 2007 [**TAB 3**].

Tableau 3 – Evolution de la population active par sexe (en milliers)

	1994	1999	2004	2005	2006	2007
Hommes	1 985,5	2 214,2	2 441,1	2 506,4	2 555,0	2 612,8
Croissance %		2,2%	2,0%	2,7%	1,9%	2,3%
Femmes	611,8	742,1	884,5	908,5	951,2	980,4
Croissance %		3,9%	3,6%	2,7%	4,7%	3,1%
Total	**2 597,3**	**2 956,3**	**3 325,6**	**3 414,9**	**3 506,2**	**3 593,2**
Croissance %		**2,6%**	**2,4%**	**2,7%**	**2,7%**	**2,5%**
2004-2007	2,6%					
1994-2007	2,1%					

Sources:
- Recensement Général de la Population et de l'Habitat (1984, 1994, 2004), INS
- Enquête Nationale sur l'Emploi (1989, 1999, 2005, 2006, 2007), INS

Par tranche d'âge: (15-19, 20-54ans et 55ans et plus): l'évolution depuis 1994 a montré que la part des 15-19 ans de la population active totale a baissé de 9% en 1994 à 4% en 2007 et ce au profit de la tranche d'âge 20-54 ans dont le poids est passé de 81% à 87%. Celle des 55 ans et plus ne représente que 9% en 2007 (10% en 1994) [**TAB 4**].

Tableau 4 - Répartition de la population active par tranche d'âge

	1994	1997	1999	2000	2001	2002	2003	2004	2005	2006	2007
15-19	9%	8%	6%	6%	6%	5%	5%	5%	5%	5%	4%
20-54	81%	81%	84%	85%	86%	86%	86%	87%	86%	86%	87%
55et plus	10%	11%	9%	9%	9%	8%	9%	8%	9%	9%	9%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Par niveau d'instruction: on constate une évolution significative. Les parts des analphabètes et des actifs de niveau primaire ont baissé régulièrement de 1994 à 2007, passant respectivement de 23,4% à11, 6% pour les premiers et de 40,9% à 36,7%. Par contre les actifs de niveau secondaire ont augmentés leurs poids de 29% à 36,7% et ceux de niveau supérieure de 6,5% à 15% (plus qu'un doublement) entre 1994 et 2007. **Ainsi globalement le nombre moyen d'année d'études pour la population active[124] serait passé de 5,4 ans à 7,3 ans (selon nos calculs) entre 1994 et 2007.**

Tableau 5 – Structure de la population active par niveau d'instruction (en %)

	1994	1999	2004	2005	2006	2007
Néant	23,4	18,2	14,2	13,3	12,7	11,6
Primaire	40,9	42,1	38,5	37,5	37,1	36,7
Secondaire	29	31,2	35,2	36	36,2	36,7
Supérieur	6,5	8,4	12,1	13,1	14	15
Non déclaré	0,2	0,1	-	0,1	-	-

Sources:
- Recensement Général de la Population et de l'Habitat (1984, 1994, 2004), INS
- Enquête Nationale sur l'Emploi (1989, 1999, 2005, 2006, 2007), INS

1.1.2 Prospective

Les projections établies par l'Institut National des Statistiques (INS) ont été faites en deux temps. D'abord l'exercice a concerné la population totale et la population d'âge actif, ensuite la population active et les demandes additionnelles. Conformément au canevas méthodologique établi nous procéderons en deux étapes.

124 Elle est différente de la population active occupée.

1.1.2.1 Projection de la population, de la population d'âge actif et du taux d'activité

Nous avons retenu le scénario moyen basé sur une baisse modérée de l'ISF. Cette dernière passerait de 2,02 en 2004 à 1,75 en 2024. Sur cette base la population totale atteindrait 12 millions en 2024 et le taux de croissance démographique passerait sous le seuil de 1% entre 2019 et 2024.

La population d'âge actif (15 ans et plus) verra son rythme de croissance, aujourd'hui de 2%, baisser d'une quinquenie à une autre, pour atteindre 1,08% en fin de période. Le poids de la population d'âge actif dans la population totale va continuer à croître en passant de 73,2% en 1994 à 75,1% en 2009, 77% en 2014, 77,5% en 2019 et 78,5% en 2024 [**TAB 6**].

Tableau 6 - Projection de l'ISF, de la population et de la population d'age actif [15 et plus] 2004-2024

	2004	2009	2014	2019	2024
ISF: Indice synthétique de fécondité	2,02	1,95	1,89	1,82	1,75
Population (milliers)	9932	10458	11037	11598	12075
croissance %		*1,04%*	*1,08%*	*1,00%*	*0,81%*
Population d'age actif (milliers)	7279	7961	8505	8991	9487
croissance %		*1,81%*	*1,33%*	*1,12%*	*1,08%*
15 ans-59 ans	6336	6934	7287	7485	7647
croissance %		*1,82%*	*1,00%*	*0,54%*	*0,43%*
% par rapport au total d'âge actif	*87%*	*87%*	*86%*	*83%*	*81%*
60 ans et plus	943	1027	1218	1506	1840
croissance %		*1,72%*	*3,47%*	*4,34%*	*4,09%*
% par rapport au total d'âge actif	*13%*	*13%*	*14%*	*17%*	*19%*

Toutefois en décomposant la population d'âge actif en deux tranches 15-59 ans et 60 ans et plus, force est de relever que la part des actifs de la première tranche de 15-59 ans va commencer à baisser d'une manière sensible à partir de 2014 (86%) pour atteindre 83% en 2019 et 81% en 2024, au contraire de la part des 60 ans et plus qui s'élèverait surtout à partir de 2014 à 14% pour atteindre 19% en 2024.

Les taux d'activité [TAB 7]

La projection table sur une évolution modérée: 46% en 2004 et 52% en 2024 (6 points sur 20ans), avec une différence notable par sexe. Pour les hommes, le taux d'activité passera de 68% à 69% entre 2004-2014 et baissera par la suite à 68% et 65% en 2019 et 2024, par contre l'évolution projetée est continue pour les femmes: 3 à 4 points de hausse pour chaque quinquenie: le taux d'activité des femmes passera de 24% à 31% entre 2009 et 2014 et de 31% à 38% entre 2014 et 2024, soit au total 14 points de hausse sur les deux décennies prochaines.

Tableau 7 - Projection du taux d'activité et de la population active (15 ans et plus)

	2004	2009	2014	2019	2024
Taux d'activité					
Hommes	68%	68%	69%	68%	67%
Femmes	24%	27%	31%	35%	38%
Ensemble	46%	48%	50%	51%	52%
Actifs					
Hommes	2450,7	2689,4	2887,4	3025,9	3118,7
croissance %		*1,88%*	*1,43%*	*0,94%*	*0,61%*
%	*73%*	*71%*	*68%*	*65%*	*63%*
Femmes	887,6	1088,8	1327,9	1598,6	1818,9
croissance %		*4,17%*	*4,05%*	*3,78%*	*2,62%*
%	*27%*	*29%*	*32%*	*35%*	*37%*
Ensemble	3338,4	3778,2	4215,2	4624,5	4937,6
croissance %		*2,51%*	*2,21%*	*1,87%*	*1,32%*

Source: INS

1.1.2.2 La population active

La population active continuera à croître à des rythmes supérieurs à 2% comparables à ceux affichés récemment 2,5%. La décélération se fera sentir surtout à partir de 2014 où la croissance annuelle moyenne passera de 2,21% en 2014 à 1,87% en 2019 et à 1,32% en 2024. La même tendance concernera les hommes et les femmes mais avec des rythmes différenciés nettement plus élevés pour les femmes en raison de la hausse projetée du taux d'activité chez ces dernières. Ainsi la population active passera de 3,3millions en 2004 à 4,9 millions en 2024, son poids passera de 33,8% de la population totale en 2004 à 35,1% en 2009, 38,1% en 2014 et 40% en 2024. Parallèlement la proportion des femmes dans cette population active passera de 27% à 29%, 32%, 35% et 37% respectivement en 2004, 2009, 2014 et 2024, soit une hausse de 10 points [voir tableau 9 ci-dessus].

1.2 Population active occupée - Emploi: caractéristiques et composition

1.2.1 La composition de la population active occupée

La population active occupée (15ans et plus) est évaluée à 3 millions en 2007 dont 73,4% d'hommes est 25,6 % de femmes. La proportion des femmes a toutefois augmenté d'une période à l'autre 23% en 1994, 24,7% en 1999, 25,7% en 2004 et 25,5% en 2007, soit un gain de 3,6 points entre 1994 et 2007 [**TAB 8**].

Tableau 8 – Evolution de la population active occupée par sexe (en milliers)

	1994	1999	2004	2005	2006	2007
Hommes	1 681,8	1 869,2	2 121,4	2 177,6	2 218,6	2 279,3
Femmes	504,6	614,7	733,3	750,9	786,3	805,8
Total	**2 186,4**	**2 483,9**	**2 854,7**	**2 928,5**	**3 004,9**	**3 085,1**

Sources:
- Recensement Général de la Population et de l'Habitat (1984, 1994, 2004), INS
- Enquête Nationale sur l'Emploi (1989, 1999, 2005, 2006, 2007), INS

La population active, occupée par niveau d'instruction affiche une amélioration, puisque les parts des analphabètes et, dans une moindre mesure, ceux de niveau primaire ont vu leur part diminuer de 23,2% à 12,7% et 39,4% et 35,9% respectivement entre 1994 et 2007. Les actifs occupés de niveau secondaire ont augmenté en proportion de 30% en 1994 à 35,2% en 2007; ceux de niveau supérieur ont pratiquement doublé leur poids de 7,4% à 14,2% entre 1994 et 2007. Ainsi le nombre moyen d'années d'études est globalement passé de 5,6 années 6,9 années. Il faut ici souligner que les actifs occupés de sexe féminin affichent un léger mieux en terme de niveau d'instruction: 5,7 ans en 1994 et 7 ans en 2007. La part des femmes actives occupées de niveau supérieur est passée de 9,1% à 17,5% entre 1994 et 2007. Si dans une moindre mesure les parts des actifs occupés de niveau primaire et secondaire sont plus élevés chez les femmes que chez les hommes les poids des analphabètes est relativement plus élevé chez les femmes: 20,8% en 2005, alors que la moyenne pour les deux sexes est de 14,3%. En fait les femmes actives occupées compensent leur déficit relatif (part plus importante des analphabètes) par un meilleur score comparativement dans le primaire, le secondaire et surtout le supérieur [**TAB 9**].

Tableau 9 - Structure de la population active occupée par niveau d'instruction (*en %)*

	1984	1989	1994	1999	2004	2005	2006	2007
Néant	42,5	32,7	23,2	19,1	14,5	14,3	13,6	12,7
Primaire	32,0	38,6	39,4	40,7	37,9	36,9	36,6	36,9
Secondaire	21,3	23,9	30,0	31,1	34,9	35,7	36,3	36,2
Supérieur	4,2	4,8	7,4	9,1	12,7	13,1	13,5	14,2

Source:
-Recensement Général de la Population et de l'Habitat (1984, 1994, 2004), INS
- Enquête Nationale sur l'Emploi (1989, 1999, 2005, 2006, 2007), INS

Quant à population active occupée par statut dans la profession, la part des salariés est prépondérante avec des fluctuations toutefois entre 1994 et 2007 (76,1% en 2004 et 88,2% en 2005), elle tourne autour d'une moyenne de 70% environ. La part des patrons est indépendante, est en moyenne de 23,4% avec un gain de 1,9 points entre 1994 et 2007 (22,7% et 26,5%en 2007). Enfin les aides familiaux ont représenté, par de là les fluctuations, en moyenne 6% [**TAB 10**].

Tableau 10 – Structure de la population active occupée selon le statut dans la profession (en %)

	1994	1999	2004	2005	2006	2007
Patrons et indépendants	22,7	23,3	20,3	24,7	24,9	24,6
Salariés	71,1	68,4	76,1	68,9	68,2	69,6
Aides familiaux	5,6	7,8	3,6	6,4	6,9	5,8
Non déclaré	0,6	0,5	-	-	-	-
Total	**100**	**100**	**100**	**100**	**100**	**100**

Source:
- Recensement Général de la Population et de l'Habitat (1984, 1994, 2004), INS
- Enquête Nationale sur l'Emploi (1989, 1999, 2005, 2006, 2007), INS

La population active occupée par tranche d'âge et par sexe, en 2007, montre que pour les tranches d'âge de 15-19, 20-24 et 25-29 la proportion est en gros 6,6% pour les hommes et 33% pour les femmes; cette proportion s'élève par la suite à 70% pour les tranches d'âge 30-34 et 35-39. Elle atteint 70% pour la tranche 40-44 et dépasse les 80% pour toutes les autres tranches d'âge en s'élevant au fur et à mesure jusqu'à 87,4% pour les 70ans et plus [**TAB 11**].

Tableau 11 - Population active occupée par tranche d'âge [15 ans et plus] - 2007

	15-19	20-24	25-29	30-34	35-39	40-44	45-49
Ensemble	136803	331030	469803	444077	429940	401277	337513
Pourcentage	4,4%	10,7%	15,2%	14,4%	13,9%	13,0%	10,9%
Hommes	90528	220989	315407	311539	310411	309099	274328
Femmes	46275	110041	154396	132538	119529	92178	63185
Pourcentage Fem./Hom	51,1%	49,8%	49,0%	42,5%	38,5%	29,8%	23,0%

Suite tableau	50-54	55-59	60-64	65-69	70+	Total
Ensemble	257616	141466	52267	36798	46543	**3085134**
Pourcentage	8,4%	4,6%	1,7%	1,2%	1,5%	
Hommes	212869	118108	44364	30993	40676	**2279310**
Femmes	44747	23358	7903	5805	5867	**805824**
Pourcentage Fem./Hom	21,0%	19,8%	17,8%	18,7%	14,4%	35,4%

Par sexe, alors que globalement le rapport des femme aux homme est de 35,4% en moyenne dans la population active occupée; cette proportion est plus élevée dans les tranches 15-19, 20-24, 25-29 et 30-34 ans [respectivement 51,1%, 49,8%, 49% et 42,5%]. Ce rapport baisse par la suite pour atteindre 14,4% pour les 70 ans et plus. Ainsi, la présence des femmes parmi la population active occupée est relativement plus importante jusqu'à 39 ans et diminue par la suite. Nous verrons par la suite l'incidence en terme de taux de chômage par tranche d'âge[125].

125 Le taux d'occupation ou d'emploi = 1 - de taux de chômage.

Le taux d'occupation par tranche d'âge est le suivant en 2007 :

15-19	20-24	25-29	30-34	35-39	40-44	45-54	54 et +	Total
65,9%	69,8%	76,1%	86,7%	93%	95,3%	96,7%	97,5%	85,9%

Source: INS

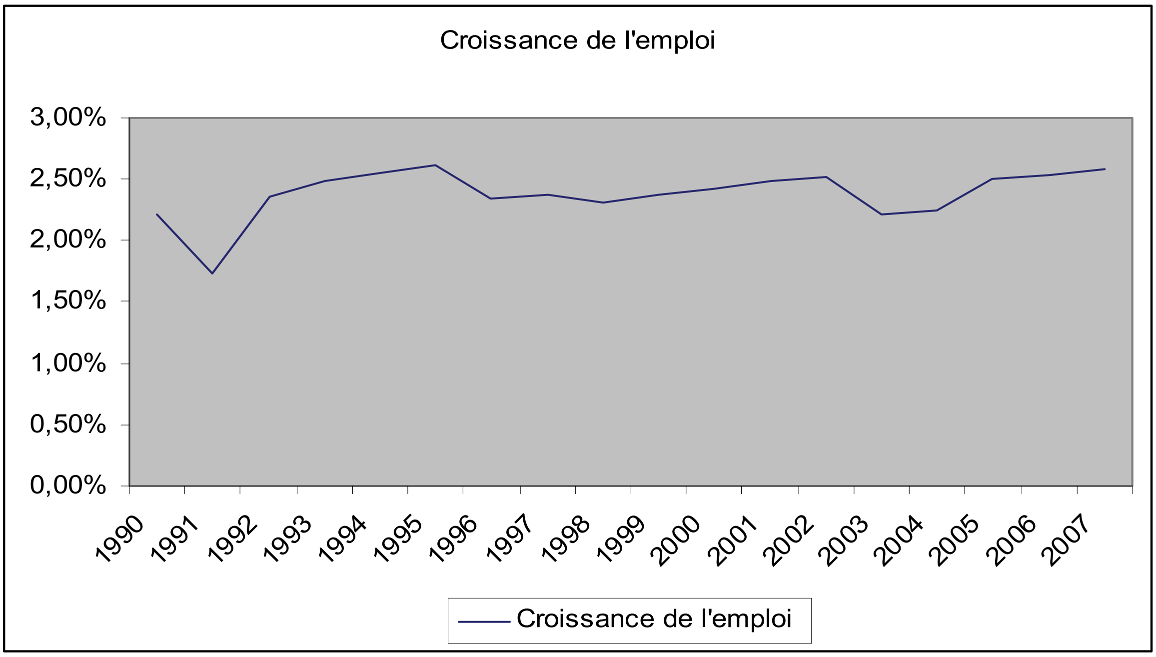
1.2.2 Evolution et composition de l'emploi

Plutôt que de recourir aux données des recensements généraux et des enquêtes périodiques sur la Population et l'Emploi de l'INS, nous avons utilisé la base de données de l'IEQ (Institut d' Etudes Quantitatives) qui permet un meilleur traitement de l'emploi dans son évolution et sa composition depuis 1990 jusqu'à 2007.

L'emploi total est passé de 2.127.600 à 3.180.000 en 2007 soit un taux de croissance de 2,4%. En 2005, 2006 et 2007 ont enregistre respectivement 2,5%, 1,5% et1,6%.

	1990	1991	1992	1993	1994	1995
Croissance de l'emploi ENSEMBLE DE L'ÉCONOMIE	2,21%	1,74%	2,36%	2,48%	2,55%	2,62%

1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
2,34%	2,37%	2,32%	2,38%	2,42%	2,49%	2,52%	2,22%	2,25%	2,50%	2,53%	2,58%



La répartition de l'emploi total par grands secteurs.

Nous avons en moyenne et pour l'ensemble de la période 1994-2007, l'agriculture et la pêche 21%, les industries manufacturières 21%, les industries non manufacturières 13%, les services marchands 29% et enfin l'administration 16%. Toutefois cette composition a subi quelques changements depuis 1994.

La part de l'emploi dans l'agriculture et la pêche a baissé de 4 points entre 1994 et 2007 (de 15%à 11%) les industries manufacturières ont gagné 2 points (de 19% à 21%), Les services marchands ont vu leur poids passer de 25% à 29%, soit 4 points de plus. Les industries non manufacturières ont reculé de 2 points (de15% à 13%). Enfin l'Administration est passée de 15% à 17% [**TAB 12**].

Tableau 12 - Répartition de l'emploi par grands secteurs

	1990	2007	moyenne
AGRICULTURE & PECHE	25%	17%	21%
INDUSTRIES MANUFACTURIERES	19%	22%	21%
INDUSTRIES NON MANUFACTURIERES	15%	12%	13%
SERVICES MARCHANDS	25%	33%	29%
ADMINISTRATION	16%	15%	16%

Source: IEQ

Les demandes additionnelles d'emploi

L'évolution de 1994 à 2007 [**TAB 13**].

Tableau 13 - Demande additionnelle et Création nette d'emplois

	1999	2004	2005	2006	2007
Demande additionnelle	71,8	74,4	86,3	91,3	87
Création nette d'emplois	58,8	65,5	73,8	76,6	80
Taux de couverture	82%	88%	86%	84%	92%

Sachant que la demande additionnelle d'emploi s'est élevée progressivement d'une moyenne de 71800 entre 1994 -1999 à 74400 entre 1999 à 2004, 86300 de 2004 à 2005, 97300 de 2005 à 2006 et 87000 de 2006 à 2007. Parallèlement les créations d'emploi ont été respectivement de 58800, 65500, 73800, 76600 et 80000 soit des taux de couverture de 82%, 88%,85%,84% et 92%.

Ce qui est intéressant ici c'est de repérer les créations nettes d'emploi par grands secteurs. Il faut d'abord remarquer qu'entre 1990 et 2007, alors que l'emploi total comme souligné, avant, a cru au rythme moyen de 2,4%; deux secteurs affichent des croissances supérieures à cette moyenne: les services marchands 4,3% et les industries manufacturières 3,2%, par contre la croissance de l’emploi dans l’administration, les industries non manufacturières et l’agriculture –pêche a été plus faible que la moyenne respectivement 2%, 1,2% et 0,3%.

Ainsi l’emploi additionnel a été concentré d’abord sur les services marchands et dans une moindre mesure dans les industries manufacturières. De 42% en 1990, la part des services dans l’emploi additionnel a fortement augmenté pour atteindre 58% en 2007. De fait depuis 1995, les services marchands contribuent à plus de la moitié de création nette d’emplois. Les industries manufacturières ont vu leur contribution à la création nette d’emplois décliner entre 1990 et 1995 (de 33% à 25%). Depuis cette part s’est quelque peu relevée jusqu’à 30% en 2002 pour enfin décroître et atteindre 24% en 2007. Ainsi le dynamisme des industries manufacturières en terme de contribution à la création nette d’emplois s’est infléchie dans les dernières années, au profit des services marchands.

La part des industries non manufacturières a tourné autour de 7% -8% entre 1990 et 2007 avec une forte chute en 1999 et 2000 (4% et 3%)

Enfin l’agriculture et pêche contribuent faiblement (avec une tendance même à la baisse) dans la création nette de l’emploi 2% - 3% en début de période et seulement 1% depuis 2003.

Comme attendu, le poids de l’administration dans l’emploi additionnel a fortement décliné de 20% et plus en début de période à 8% en 2007.Ultérieurement en analysant le marché de l’emploi nous tirerons quelques leçons à partir de ces résultats.

Projection des demandes additionnelles d’emploi [TAB 14]

Sur la base du scénario moyen de l’INS dont les grandes lignes ont été déjà introduites, il convient de présenter les perspectives en terme de demandes additionnelles d’emplois entre 2004 et 2024.

Alors que les moyennes des demandes additionnelles d’emploi enregistrées en 2005, 2006 et 2007 ont été de 86300, 91100 et 87100 (soit une moyenne de 88205) le scénario envisage une demande additionnelle de 88000 entre 2004 et 2009 et 87400 entre 2009 et 2014. Les pressions actuelles vont perdre. De fait c’est au cours de 3ème quinquenie que le décroît va commencer à se sentir 81800 entre 2014-2019. En fin de période la demande additionnelle tombera à 52600 par an. Ce qui est remarquable dans cette évolution projetée est l’inversion de la part des hommes et des femmes. Alors qu’entre 2004-2009 la part des femmes dans la demande additionnelle d’emploi est de 45,7%, elle s’élèvera à 54,7% entre 2009-2014, à 65,7% entre 2014 et 2019 et enfin à 70,4% !!!

Tableau 14 - Demandes additionnelles annuelles d'emploi

	2004	**2009**	**2014**	**2024**
Total(milliers)	88	87,4	81,8	62,6
Hommes	47,7	39,6	27,7	18,5
Femmes	40,2	47,8	54,1	44,1

Pour mieux situer le tableau prospectif il faut rappeler que jusqu’alors le PIB à prix constant a connu un rythme de croissance tendancielle de 4, 8% entre 1990 et 2007, celui de l’emploi de 2,4% soit une élasticité croissance/emploi de 0,50. Comme déjà spécifié, le taux de couverture des demandes additionnelles d’emploi par les créations nettes d’emploi a été en moyenne de 87,3% entre 2004 et 2007. **Le défi d’un nouveau palier pour une croissante plus employante est là.**

2. Les performances du marché de travail

2.1. La législation du travail

La promulgation du code de travail tunisien remonte à 1966; plusieurs tentatives de réformes du code se succèdent et s'accélèrent dans le temps. Mais personne ne doute que la réforme la plus importante, du point de vue nombre d'articles modifiés mais aussi les thèmes abordés, est celle de 1994[126] complétée par celle de 1996[127]. Plus du quart du code a connu une révision touchant aussi bien les relations individuelles que les relations collectives de travail. De plus, il faut signaler que depuis l'accord cadre du 17/44/1990, une négociation triennale des salaires a pu être enregistrée, d'une manière régulière, touchant aussi bien les conventions de branche que les statuts du personnel pour le secteur public. Le 7ème round de cette négociation couvre la période 2008/2010.

2.1.1. La flexibilité externe

Faut–il rappeler que l'apport de la révision du code de travail effectué à deux dates successives, en 1994 et 1996 était pour tenir compte du nouveau contexte économique d'ouverture et assouplir les règles de travail.

- **Le recrutement**
- L'employeur est libre de choisir la nature du contrat de travail (contrat à durée indéterminée, contrat à durée déterminée ou contrat à temps partiel)
- De même le régime juridique du contrat de travail à temps partiel a été défini pour la première fois en 1996, même si dans la pratique le recours à ce type de contrat est resté très limité.
- **Le licenciement**
- Le droit du travail tunisien réglemente les deux régimes de licenciement à savoir le licenciement disciplinaire et le licenciement économique. Pour le premier, il s'exerce en tant que sanction disciplinaire et la réforme de 1994 a innové sur les points suivants:
  - Distinguer le vice de forme du vice du fond;
  - Plafonner le montant des dommages intérêts pour vice de forme à 4 mois de salaire et pour vice de fond à 3 ans de salaire;
  - Incorporer dans le code de travail la liste indicative des fautes graves constitutives de causes réelles et sérieuses;
  - Simplifier la procédure judiciaire devant le conseil de prud'hommes.

Quant au deuxième type licenciement, il ne touche que les salariés permanents: l'entreprise peut justifier ce licenciement économique, suite à sa restructuration et la réforme du code du travail en 1996 a simplifié par ailleurs, la procédure du contrôle administratif de l'emploi en :

- Limitant les délais de la commission de contrôle de licenciements à 1 mois 3 jours;
- Permettant aux parties de négocier des alternatives au licenciement économique;
- Négociant les indemnités de licenciement économique sur une base conventionnelle et
- En saisissant le juge en cas d'échec de conciliation.

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126 Loi n°94-29 du 21 février 1994.

127 Loi n° 96-62 du 15 juillet 1996.

2.1.2. La flexibilité interne

Elle consiste à varier le nombre d'heures de travail sans modifier le nombre de salariés. En effet la durée hebdomadaire du travail comprise entre 40 et 48 heures peut être fixée sur la base du mois ou de l'année. Seulement cette mesure d'annualisation de la durée légale de travail ne peut être effective que dans le cadre de la négociation collective, or ce n'est que récemment que le principe de négociation de l'annualisation a été avalisé par les partenaires sociaux.

L'annualisation de la durée légale de travail devrait permettre la compensation des semaines et donc l'élimination des heures supplémentaires qui sont par nature majorées. C'est probablement cet acquis qui a freiné les syndicats à accepter jusqu'alors, un nouveau compromis social basé sur l'annualisation des heures de travail.

2.1.3. La sous-traitance ou l'extériorisation du personnel

Elle consiste à confier à d'autres entreprises une part de l'activité de l'entreprise jugée non stratégique. Lors de la révision du code du travail en 1996, tout un chapitre relatif aux entreprises de travail temporaire a été retiré de la concertation, suite au refus de syndicat, croyant que la réglementation de telles sociétés risquait l'apparition du phénomène. Quelques années plus tard, le même syndicat revendique l'intervention de l'Etat pour réglementer les entreprises de travail temporaire. Face donc à ce vide juridique, il y a recours de plus en plus soit aux entreprises de sous-traitance régies par les Articles 28, 29 et 30 du code du travail, soit aux entreprises de travail temporaire que le code de travail ne réglemente pas mais n'interdit pas non plus. Ce recours à la sous-traitance du personnel semble s'adapter aux fluctuations de l'entreprise vue la contrainte de 4 ans maximum pour le salarié temporaire.

2.1.4. La flexi - sécurité

En comparaison des pays de l'OCDE, la Tunisie offre une sécurité d'emploi au sein de l'entreprise, supérieure à la moyenne, malgré les réformes introduites en matière de recrutement et de licenciement. En effet, les licenciements pour raisons économiques demeurent fortement réglementés et l'interférence de l'Etat est importante (l'Art.21 du code du travail est considéré comme l'article le plus détaillé).

Dans un rapport récent la Banque Mondiale met, en effet, en exergue le fait qu'en Tunisie le code du travail a permis une certaine flexibilité par l'introduction des contrats à durée déterminée (CDD), mais les procédures de licenciement sont considérées comme étant rigides; l'indice de rigidité du marché du travail serait parmi les plus élevés au monde selon la BM. Par ailleurs, le système d'indemnisation est plutôt selon la BM difficile à mettre en œuvre d'une manière effective et comparativement aux autres pays de la région MENA, il assure une moindre sécurité au salarié. Il y a de fait un vide juridique réglementant d'une mesure générale et globale l'indemnisation pour cause de chômage économique ou technique.

La Caisse Nationale de Sécurités Sociale permet au salarié licencié dans le cas des entreprises en difficultés de toucher une indemnisation pendant 6 mois au plus et de bénéficier de la prise en charge pour soin de santé pendant un an. A défaut, l'indemnisation est le résultat d'une négociation aléatoire, d'où le flou et les difficultés de la mise en œuvre effective des indemnisations. L'UGTT (syndicat des travailleurs) revendique la mise en place d'une caisse d'assurance spécifique en cas de licenciement pour raison économique et technique, une caisse indépendante de la CNSS, avec une participation des partenaires sociaux et de l'Etat. L'objectif est d'assurer une sécurité mutuelle aux salariés tout en recherchant à travers la formation et le recyclage leur réinsertion. Cette revendication rejoint en partie une recommandation de la Commission Nationale sur l'Emploi qui préconise que les chômeurs licenciés soient pris en charge par le cadre institutionnel du marché de l'emploi pour assurer leur employabilité moyennant les instruments à la formation et à l'aide à la recherche de l'emploi.

Les négociations collectives en cours ont permis aux partenaires sociaux d'avancer sur les points suivants:

- Une meilleure reconnaissance effective du droit syndical et notamment des garanties quant à l'exercice de ce droit par les responsables du syndicat autorisés pour l'exercice protection des délégués.
- La priorité de recrutement accordée au licencié titulaire d'un CDD. Cette nouvelle disposition permet à ce dernier, à la fin du contrat d'être prioritaire en cas d'un nouveau recrutement dans un poste similaire pendant 6 mois à l'expiration du CDD. Pour le salarié ayant 4 ans d'ancienneté en cas de licenciement, il bénéficiera d'une priorité lors de nouveau recrutement
- Accord de principe pour négocier l'annualisation.

Un nouveau compromis social est à trouver visant à introduire:

Plus de flexibilité pour les entreprises en matière de licenciement

- Allégement des procédures, suppression éventuelle de l'avis de la commission de contrôle des licenciements en cas de restructuration économique ou technique à l'entreprise. Abaissement des coûts des licenciements)
- D'aménagement du temps de travail par l'annualisation.
- De règlementation des entreprises de travail temporaire.

Plus de sécurité de l'emploi pour les salariés**,** par la mise en place d'un nouveau dispositif institutionnel permettant l'indemnisation du chômage couplé à une politique active du marché du travail (formation-recyclage pour la réinsertion) co-organisé, co-géré et co-financé par l'Etat et les partenaires sociaux.

2.1.5. Les charges sociales

Les travailleurs et employeurs du secteur privé doivent contribuer l'équivalent de 23,75% de la masse salariale à la CNSS (16% par les employeurs et 7,75% par les travailleurs). Toutefois, d'autres charges sociales indirectes (notamment la taxe sur la formation professionnelle TFP, le logement social, l'assurance groupe, les accidents de travail et les maladies professionnelles et les dispositifs de prévention des risques professionnels imposées par la législation) s'inscrivent pour 12% ce qui augmente le total des charge sociales professionnelles par les employeurs à près de 28%.

Comparativement, la Tunisie occupe une position médiane en terme de poids des charges sociales. Toutefois le mode de calcul des charges sociales en fonction de la masse salariale n'incite pas les entreprises à des choix intensifs en travail (création d'emplois) mais plutôt à des choix intensifs en capital, d'autant que depuis la mise en place de zone de libre échange entre la Tunisie et l'U.E le coût des équipements importés a baissé relativement.

2.2. Revenu National et salaires

2.2.1. PIB par tête et convergence

En 2007 le PIB à dinars courants était de 44,8 milliards (25 milliards d'Euros environ). A dinars constants (base 100 en 1990) le taux de croissance annuel moyen a été de 4,8% entre 1990 et 2007. Le PIB par tête est de 2344 dinars (1304 euros) en 2007. A pris constant, il a progressé au rythme annuel moyen de 3,4%. Au cours des années 2003-2007, la croissance du PIB par tête et à prix constant a été en moyenne de 4,5% par an (moyenne des taux de croissance annuels).

Evalué en parité de pouvoir d'achat (PPA) et en dollars en 2005 le PIB par tête s'élevait à 7137 USD (contre 4422 USD en 1990). Comparée à la moyenne de l'U.E (15) et à l'U.E 25et à l'U.E (zone euros) le PIB par tête PPA en Tunisie montre une réduction des écarts de 6,7 points (29,7% - 23%) par rapport à l'U.E.(15) entre 1994 et 2005, de 6,9 points par rapport à l'U.E (25) et de 7,2 points par rapport à l'U.E. (zone euro). En gros en 2005 le PIB par tête PPA en Tunisie représente 30% en moyenne du PIB par tête PPA de l'.U.E. La Tunisie est ainsi un des rares pays de la rive sud de la Méditerranée a avoir enregistré une convergence modérée (6 à 7 point sur 16 ans) avec l'U.E.

2.2.2. La répartition

Cette relative bonne performance de la Tunisie en terme de progression du PIB par tête ne s'est pas toutefois accompagné d'une amélioration en terme de répartition. En effet, l'indice de Gini montre une dégradation entre 1990 et 2005 tant au niveau national que communal (urbain) ou non communal (rural) comme le montre le tableau suivant:

Evolution de l'indice de Gini

	1990	1995	2000	2005
Communal	0,374	0,389	0,391	0,390
Non communal	0,354	0,353	0,358	0,376
National	0,401	0,417	0,409	0,410

Source INS

En milieu communal, l'inégalité s'est accusée surtout entre 1990 et 1995, depuis on enregistre une certaine stabilité; en milieu non communal l'évolution est inverse avec une certaine stabilité entre 1990 et 1995 et une détérioration depuis. Le niveau national, plus tiré par le communal a vu une dégradation sensible entre 1990 et 1995 avec un certain rattrapage par la suite, toutefois et comme précisé avant, comparé à 1990(0,401) la détérioration en 2005 (0,410) est manifeste.

2.2.3. Les salaires [TAB 15]

En 2007, la masse salariale se montait à 16,1 milliards DT pour un emploi total salarié de 2,2 millions soit un salaire annuel moyen de 7298DT ou 608DT par mois (4061 euros par an et 338. euros par mois). **Le salaire moyen** à dinars courants a progressé au rythme annuel moyen de 6,1% entre 1990 et 2007. Hors inflation, le salaire moyen (réel) a cru avec un taux de 2,1% entre 1990 et 2007. **La part des salaires** dans le PIB a quelque peu changé, elle représente environ 36% en moyenne (35,2% en 1990 et 36,5% en 2007).

Le S M I G (48 heures par mois) était de 240DT en 2007 133,5euros contre 128DT en 1990. Evalué aux prix constant de 1990, il serait de 126 DT en 2007 soit une légère détérioration (moins de 0,1% en moyenne par an). **Le SMAG** (Agriculture) est de 7,4DT en 2007 par jour (4,1 euros) contre 3,6DT en 1990; au prix constant de 1990, il serait en 2007 de 3,8DT environ, soit une légère amélioration en terme de pouvoir d'achat (+0,3% par an en moyenne).

Tableau 15 - Salaires moyens à prix courant et à prix constant

	1990	**1991**	**1992**	**1993**	**1994**	**1995**	**1996**	**1997**	**1998**
Salaire moyen (prix courant)	2 678	2 962	3 339	3 528	3 705	3 979	4 211	4 542	4 688
Taux de croissance	*7,6%*	*10,6%*	*12,7%*	*5,7%*	*5,0%*	*7,4%*	*5,8%*	*7,9%*	*3,2%*
Salaire moyen (prix constant)	2 679	2 739	2 917	2 964	2 972	3 005	3 065	3 190	3 193
Taux de croissance	*1,0%*	*2,2%*	*6,5%*	*1,6%*	*0,3%*	*1,1%*	*2,0%*	*4,1%*	*0,1%*
Suite tableau 15	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**
Salaire moyen (prix courant)	4 970	5 247	5 529	5 710	5 936	6 265	6 594	6 934	7 298
Taux de croissance	*6,0%*	*5,6%*	*5,4%*	*3,3%*	*3,9%*	*5,6%*	*5,2%*	*5,2%*	*5,2%*
Salaire moyen (prix constant)	3 296	3 379	3 491	3 510	3 552	3 619	3 732	3 756	3 833
Taux de croissance	*3,2%*	*2,5%*	*3,3%*	*0,6%*	*1,2%*	*1,9%*	*3,1%*	*0,6%*	*2,1%*

Compte tenu de la légère détérioration en terme de pouvoir d'achat (- 0,1% pour le SMIG et de la progression du salaire réel moyen de 2,1%, le rapport du SMIG au salaire moyen s'est détérioré. En 1990 le salaire moyen était 1,7 fois le SMIG (223DT contre 120DT). En 2007 il était de 2,5 fois le SMIG. Ceci montre une inégalité salariale croissante entre 1990 et 2007. L'inégalité salariale est aussi de nature sectorielle. En 2007 alors que le salaire réel moyen est de 3833DT à l'échelle nationale, il est de 6408DT par an (67% plus) dans l'administration et 1570DT (41% moins) par an dans l'agriculture.

Dans les services marchands il était en 2007 et par an 3543DT, et 3179DT dans les industries manufacturières (mines plus énergie), et 3029DT dans les industries manufacturées; ce que représente respectivement par rapport à la moyenne nationale 92%, 83% et 79%[128].

Salaire et convergence

Evalué en euros, le salaire moyen annuel en Tunisie était de 4309 euros soit 15,1% du salaire moyen brut de l'UE (25). Comme le montre le tableau suivant [**TAB 16**], on note plutôt une divergence entre 2001 et 2006 puisque la proportion est tombée: 12,3% en 2006.

128 Faut-il rappeler que la population activée occupée dont le niveau d'instruction néant + primaire est plutôt sans ou avec peu de qualification (12,7%+36,9% soit 49,6% de la population active occupée: 1,5 millions) elle doit de ce fait se contenter du SMIG ou de moins que le SMIG. L'écart entre cette partie de la population et les classes moyenne a du en toute logique augmenter depuis 1990.

Tableau 16 – Salaire annuel moyen en euros: Tunisie – UE 25

	2001	2002	2003	2004	2005	2006
Tunisie (euro)	4309	4258	4076	4043	4089	4152
UE 25 (euro)	28433	30701	30943	30165	31050	33738
En %	15,15%	13,87%	13,17%	13,40%	13,17%	12,31%
Tunisie ($)	3856	4020	4613	5027	5080	5219
Tunisie PPA	11645	11698	11901	12115	12547	
UE 25 ($) PPA	25445	28989	35019	37504	38576	42405
En %	45,77%	40,35%	33,98%	32,30%	32,53%	

En dollars PPA, l'écart est bien sûr moins élevé mais là aussi la tendance est plutôt à la divergence entre 2001 et 2006.

Salaire – Emploi et productivité par grands secteurs

A l'exclusion de l'administration, les services marchands offrent le salaire moyen le plus élevé en 2007, et c'est là où la productivité est la plus élevé (8800DT par emploi par an). De plus ici, dans les services marchands la productivité croit à un rythme nettement plus soutenu que le salaire réel moyen: 2,1% pour la première et 0,8% pour la seconde. De plus comme nous l'avons signalé au paravent ici l'emploi croit le plus rapidement 4,3% par an pour une moyenne nationale de 2,4%.

Dans les services marchands se vérifie une corrélation négative entre la croissance de l'emploi et celle du salaire moyen.

Les industries manufacturières dont le rythme de croissance de l'emploi vient en seconde position 3,2% par an en moyenne entre 1990 et 2007, ont une productivité plus faible (5600DT par emploi) comparativement et qui de surcroît progresse à des rythmes relativement plus bas 1,3% en moyenne par an entre 1990 et 2007. Ici la productivité et le salaire moyen par contre progressent à des rythmes plus ou moins proches 1,3% et 1,1% entre 1990 et 2007.

Les industries non manufacturières montrent, qu'à l'inverse des services marchands, le rythme de croissance de l'emploi est plutôt faible 1,2% alors que celui de salaire réel moyen est élevé 3,5% (la relation négative entre progression de l'emploi et croissance du salaire moyen se vérifie ici aussi). Ici la productivité (6500DT par emploi) est plus faible que dans les services marchands (8800DT) en 2007, et croit à un rythme plus élevé que le salaire moyen 2,3% et 3,5%.

Enfin dans l'agriculture–pêche, la création d'emploi est faible 0,2% (l'élasticité croissance / emploi = 7%) est très faible, alors que le salaire moyen tout en étant comparativement à la moyenne nationale faible, croit à un rythme élevé 3,2% et supérieur à celui de la productivité 2,4% [**TAB 17**].

Tableau 17 – Salaire moyen – Productivité et Emploi

	Croissance 1990-2007				2007	
	Emploi	PIB	Productivité	Salaire réel moyen	Salaire réel moyen	Productivité (PIB/ emploi DT)
AGRICULTURE & PÊCHE	0,2%	2,6%	2,4%	3,2%	1570	4800
INDUSTRIE MANUFACTURIÈRES	3,2%	4,6%	1,3%	1,1%	3029	5600
INDUSTRIE NON MANUFACTURIÈRES	1,2%	3,5%	2,3%	3,5%	3179	6500
SERVICES MARCHANDS	4,3%	6,4%	2,1%	0,8%	3543	8800
ENSEMBLE DE L'ÉCONOMIE	**2,4%**	**4,8%**	**2,3%**	**2,1%**	**3833**	**7500**

3. Marché du travail: Problèmes et défis

3.1. Le chômage

En 2007 ont comptait 508.100 chômeurs contre 410.900 en 1994 soit une progression annuelle moyenne de 1,4%. Ce rythme s'est accéléré entre 2004-2007, en passant à 2,3% par an.

3.1.1. Le taux de chômage par sexe

Il montre un différentiel qui s'accuse au fil des années. D'abord le taux de chômage est toujours plus élevé chez les femmes que chez les hommes: 1,8 points au détriment de femmes en 1994 et 1999, depuis l'écart se creuse: 3,9 points en 2004, 4,1 points en 2006 et 5points en 2007.

Tableau 18 - Evolution du taux de chômage par sexe (15 ans et plus) [en %]

	1994	1999	2004	2005	2006	2007
Hommes	15,3	15,6	13,2	13,1	13,2	12,8
Femmes	17,5	17,2	17,1	17,3	17,3	17,8
Total	**15,8**	**16,0**	**14,2**	**14,2**	**14,3**	**14,1**

Sources:
- Recensement Général de la Population et de l'Habitat (1984, 1994, 2004), INS
- Enquête Nationale sur l'Emploi (1989, 1999, 2005, 2006, 2007), INS

Ainsi le chômage touche de plus en plus les femmes. Alors que globalement le taux de chômage à l'échelle nationale a quelque peu décliné en passant de 15,8% en 1994 à 14,1% en 2007; les hommes ont connu une baisse de 3,5points (15,3% à 12,8%) au contraire de femmes où le taux de chômage a plutôt augmenté passant de 17,5% à 17,8%.[129] [**TAB 20**]

3.1.2. Par niveau d'instruction [TAB 19 & 20]

Alors que l'effectif des chômeurs analphabètes représente en 1994, 25% du total, en 2007 il est tombé à seulement 5%. Ceux de niveau primaire ont vu leur poids diminuer de 50% à 35% entre 1994 et 2007. Parallèlement, les chômeurs de niveau secondaire ont augmenté fortement leurs poids, de 24% à 40%, ceux de niveau supérieur ont multiplié par 10 leur proportion dans le total des chômeurs de 2% à 20% entre 1994 et 2007 !!

Le nombre de chômeurs ayant un niveau supérieur a enregistré une hausse très prononcée depuis 1994: 10,9% par an en moyenne passant de 6400 à 102300 en 2007. Entre 2001 et 2007 il a atteint 18,4% en moyenne par an.

Tableau 19 – Evolution des chômeurs par niveau d'instruction (en milliers)

	1994	1999	2004	2005	2006	2007
Analphabète	102,7	64,2	61	35,5	35,5	24,7
Primaire	204	236	200,3	201,5	197,8	177,7
Secondaire	97,8	151,1	171,8	183,2	181,8	203,4
Supérieur	6,4	21,2	40,8	66,2	86,1	102,3
Total	**410,9**	**472,5**	**473,9**	**486,4**	**501,3**	**508,1**

Sources:
- Recensement Général de la Population et de l'Habitat (1984, 1994, 2004), INS
- Enquête Nationale sur l'Emploi (1989, 1999, 2005, 2006, 2007), INS

Tableau 20 – Evolution des chômeurs par niveau d'instruction (en %)

	1994	1999	2004	2005	2006	2007
Analphabète	16,8	11,9	12,7	7,8	8,0	5,9
Primaire	19,2	18,9	15,7	15,7	15,2	13,5
Secondaire	13,0	16,4	14,7	14,9	14,3	15,4
Supérieur	3,8	8,6	10,2	14,8	17,5	19,0
Total	**15,8**	**16,0**	**14,2**	**14,2**	**14,3**	**14,1**

Sources:
- Recensement Général de la Population et de l'Habitat (1984, 1994, 2004), INS
- Enquête Nationale sur l'Emploi (1989, 1999, 2005, 2006, 2007), INS

Le premier paradoxe est que le nombre moyen d'année d'étude pour la population active en chômage est plus élevé désormais que dans la population active occupée; il est passé de 4,5 ans à 8,3 ans chez les chômeurs et de 5,4 ans à 7,3 ans chez les actifs occupés entre 194 et 2007!

Le deuxième paradoxe est qu'en 2007, le taux de chômage augmente au fur et à mesure que le niveau d'instruction s'élève: 5,9% pour les analphabètes, 13,5% pour ceux de niveau primaire, 15,4% pour

129 En 2007 les femmes au chômage 174616 respectivement 34,4% du total des chômeurs.

les chômeurs de niveau secondaire et 19% pour ceux de niveau supérieur. Cette configuration est singulière et indique une déficience globale dans l'interface système de formation et marché de l'emploi.

Le taux de chômage a par ailleurs baissé pour les analphabètes et ceux de niveau primaire, passant respectivement de 16,8% à 5,8% et de 19,2% à 13,5% entre 1994 et 2007 à l'inverse le taux de chômage a augmenté pour ceux ayant le niveau secondaire 13% en 1994 et 15,4% en 2007 et surtout pour ceux de niveau supérieur où le taux de chômage a explosé passant de 3,8% à 19% entre 1994 et 2007. Cette tendance va s'accentuer car il faut savoir qu'entre 1994 et 2007 le nombre des diplômés du supérieur est passé de 11654 à 58598.

A titre indicatif le nombre d'étudiants dans le supérieur croît depuis 1990 à 2007 au rythme annuel moyen de 10,5% (62658 en 1990 et 350829 en 2007), le nombre de diplômés progresse à rythme fulgurant de 14,9% entre 1994 et 2007 (de 5552 à 58598).

Faut- il rappeler à titre illustratif que l'emploi total croît au rythme de 2,4% par an en moyenne et que la part des actifs occupés de niveau supérieur est de 14,2%. Ainsi les créations nouvelles d'emploi ne peuvent satisfaire qu'un faible part des diplômés, d'où la hausse continue du stock de chômeurs diplômés.

3.1.3 Le taux de chômage par tranche d'âge en 2007 [TAB 21]

Par tranche d'âge, ce qu'il faut relever est que le taux de chômage est d'autant plus élevé que l'on est dans les tranches jeunes: 15-18 ans, 20-24 ans, 25-29 ans et 30-34 ans: 29,1%, 25,4%, 17,4% et 12,5% respectivement en 1994; 34,1%, 30,2%, 23% et 13,3% en 2007. Il diminue au fur et à mesure pour les autres tranches d'âges.

De plus pour ces 4 tranches d'âge la situation s'est particulièrement dégradée:

- 5 points pour la tranche d'âge 15-18 ans
- 4,8 points pour la tranche d'âge 20-24 ans
- 6,5 points pour la tranche d'âge 25-29 ans et 0,8 points pour la tranche d'âge 30-34ans.

Pour toutes les autres tranches le taux de chômage a plutôt baissé d'une ampleur variable. Ainsi la situation est particulièrement aigu pour le 15-19 ans, 20-24ans, et 25-29ans et dans une nette moindre mesure pour les 30-34ans.

Enfin, le chômage a une dimension régionale manifeste. En 2007 le taux de chômage dans les gouvernorats du littoral, à quelques exceptions (Manouba au Nord Mahdia au centre et Gabès au Sud) sont inférieurs à la moyenne nationale, par contre, les gouvernorats de l'intérieur (le Kef, Seliana, Jendouba au Nord Ouest, Kasserrine, Gafsa, Tozeur, et Tataouine au Sud Ouest) ont des taux de chômage élevés, atteignent 25,1% à Tozeur et 24, 1% à Jandouba, alors que la moyenne nationale est de 14,1%.

Tableau 21 – Evolution du taux de chômage par tranches d'âges (en %)

	1994	1999	2004	2005	2006	2007
15-19	29,1	37,2	32,4	31,0	32,5	34,1
20-24	25,4	31,2	26,9	30,5	30,5	30,2
25-29	17,4	21,0	20,1	23,4	23,0	23,9
30-34	12,5	12,0	12,5	13,0	12,6	13,3
35-39	10,1	8,5	8,6	7,2	7,7	7,0
40-44	9,0	6,7	7,1	5,5	5,7	4,7
45-54	9,5	5,7	5,8	4,2	4,5	3,3
54 et plus	10,0	5,2	5,6	2,5	3,4	2,5
Total	**15,8**	**16,0**	**14,2**	**14,2**	**14,3**	**14,1**

Ainsi il ressort que le chômage frappe surtout

- Les jeunes
- Les femmes
- Les diplômés du supérieur
- Les régions de l'intérieur.

Le ciblage sur ces 4 catégories s'avère nécessaire dans toute politique d'emploi conséquente.

3.2. Le secteur informel

En Tunisie, le secteur informel est défini en utilisant les critères relatifs au statut juridique de l'unité, à la taille de l'entreprise en terme d'effectif de salariés et à la tenue d'une comptabilité de l'entreprise, de façon à ce que le secteur couvre les entreprises ayant les caractéristiques suivantes:

- Statut juridique: personnes physiques,
- Employant moins de 6 salariés,
- N'ayant pas de comptabilité.

Le champ de l'enquête de l'INS sur les micro-entreprises de 2002 couvre seulement les activités non agricoles[130], il ne s'agit que des entreprises ayant un numéro fiscal et qui sont généralement localisées. Les unités non immatriculées fiscalement et non localisées dans des établissements (travail à domicile, activité ambulantes,…) qui complètent le secteur informel ne sont pas couvertes par l'enquête. Le tableau suivant [**TAB 22**] montre que **l'emploi informel** (qui caractérise les individus et non les unités économiques) représentent un peu plus du tiers de l'emploi non agricole **(34,3%)** et le sous secteur des micro-entreprises exerçant leurs activités dans des établissements enregistrés représente 57,4% de cet ensemble.

Le secteur moderne représente un peu moins de deux tiers de l'emploi non-agricole (65,7%). Il est constitué pour sa part des entreprises privées avec bilan qui représentent 61,9% du sous-secteur, les entreprises publiques qui en représentent 8,5% et l'administration publique (environ 29,6%). Sans vouloir faire dire à ces estimations plus qu'il ne convient, ce tableau a simplement pour objectif de replacer le secteur informel dans l'ensemble du champ de l'emploi non-agricole: il en représente approximativement 34,3%, ce qui est substantiel pour le marché du travail.

130 Le nombre d'entreprise de moins de 6 salariés intégré dans le champ de l'enquête s'élève à 392.000 (echantillon initial de 12.530 entreprises; taux de réponse de 65,8%). L'exploitation de l'enquête a été faite sur la base des 7833 entreprises répondantes n'ayant pas de comptabilité.

Tableau 22 - Grandes composantes de l'emploi non agricole en 2002

Secteur non agricole	Emplois en milliers	%
Secteur informel	755	34,3
micro-entreprises	433	57,4
travailleurs à domicile ou non déclarés (hors établissement)	322	42,6
Secteur moderne	**1448**	**65,7**
Privé (avec bilan et >5 salariés	825	57
Entreprises publiques	123	8,5
Privé (avec bilan et <6 salariés)	71	4,9
Administration	429	29,6
Total emploi non agricole	**2203**	**100.0**

Source: INC

Sachant que les deux enquêtes de l'INS de 1997 et 2002 ont été réalisées selon la même méthodologie et ayant collecté les mêmes informations sur la base d'un questionnaire quasiment identique, une comparaison des principaux indicateurs permet de relever les principaux points suivants quant à l'évolution de la composante des micro-entreprises (57,4% du secteur informel en 2002):

- En ce qui concerne la structure de l'emploi par branche, on constate un déplacement de la main d'œuvre de l'industrie vers les services: l'emploi dans l'industrie qui représentait 21,6% de l'emploi dans les micro-entreprises en 1997 n'en représente plus que 18,1% en 2002, alors que l'emploi dans les services est passé dans le même temps de 30,4% à 33,6%.
- Globalement la part des femmes dans l'emploi des micro-entreprises a augmenté, passant de 14,6% à 15,9%, essentiellement du fait de leur plus grand poids dans les activités commerciales.
- **Les micro-entreprises ne jouent pas un rôle d'absorption des jeunes entrant sur le marché du travail au sortir du système éducatif, mais offrent plutôt des opportunités aux femmes adultes qui étaient en dehors du marché du travail (inactives).**
- **La stabilité des salaires moyens dans les micro-entreprises par rapport au SMIG:** en 2002, tout comme en 1997, le salaire moyen pour l'ensemble des branches s'établit à 1,1 fois le SMIG: **l'alignement sur le SMIG** semble général, les branches qui se situaient au dessus tendent vers ce niveau, tout comme les branches qui se situaient nettement au dessus (transport). Ainsi le SMIG semble t-il exercer un rôle important, sauf dans deux branches: le textile –habillement-cuir (qui connaît une baisse importante) et les services personnels (qui restent stable à un niveau très inférieur).

Nous verrons ultérieurement la relation entre le secteur informel et l'émigration.

3.3. Emigration et marché du travail

La population étrangère en Tunisie s'élevait à 35192 personnes (selon le Recensement Général de la Population en 2004) soit 0,35% de la population totale en Tunisie. Les algériens (27,3%) et les marocains (18,1%) arrivent aux premiers rangs suivis par les Français (13,1%). L'ensemble des pays arabes constitue 60,2%, et l'Europe 27,1% du total, le reste 12,7% représentaient les autres nationalités.

Les actifs occupés étrangers étaient au nombre de 13250 soit seulement 0,45%. Les actifs occupés en Tunisie en 2004. Parmi les actifs occupés étrangers la proportion des femmes était de 30%.

Par niveau d'instruction les actifs occupées étrangers (ici âgés de 10ans et plus), les analphabètes représentaient 12,6% ceux de niveau primaire 18,2%, ceux de niveau secondaire 34% et supérieur 35,2%. Le nombre moyen d'années d'étude est de 9,3 points ans environ. Ce qu'il y a lieu ici de souligner est que la proportion des actifs occupés de niveau supérieur et à l'exception de ceux originaires d'Algérie (12,8%) du Maroc (14,9%) de la Libye (25%) et de l'Egypte (39,2%) dépasse partout les 50% surtout pour ceux originaires d'Europe (à l'exception de l'Italie 44,4%). Certes la colonie Maghrébine tire vers le bas le niveau moyen d'instruction pour les actifs occupés étrangers, mais pour le reste, le constat qui s'impose est celui **d'actifs occupés fortement instruits comparativement**.

Les actifs occupés étrangers de niveau supérieur (10869) en 2004 représentaient en gros 4% des actifs occupés de même niveau à l'échelle nationale. D'une manière générale ils sont des cadres supérieurs et dirigeants d'entreprises (23,1%) dans des métiers intellectuels (19,8%) soit près de 43% des actifs occupés étrangers. Les cadres moyens représentaient 9,9%. Les ouvriers et employés non qualifiés 15,9% le reste représentant 31,2% du total dans différentes professions qualifiées. Ainsi quoique le poids de la population active occupée étrangère est relativement marginal (0,45%) la population active occupée étrangère hautement qualifiée (niveau supérieur et proportionnellement plus importante 4% par rapport à la population active occupée de niveau supérieur à l'ensemble du pays).

Les immigrés travaillant en Tunisie

Il faut d'emblée souligner que la législation tunisienne est très stricte concernant le travail des étrangers. Le principe de la préférence nationale est fortement.présent.

Les étrangers travaillant en Tunisie sont soumis à deux régimes:

- Obtention d'un contrat de travail visé par le Ministre de l'Emploi;
- Non soumission au visa du contrat de travail.

Le contrat de travail pour un travailleur étranger est soumis à deux conditions:

3. L'inexistence de compétence tunisienne dans le domaine concerné
4. Sauf dispositions législatives spécifiques ou conventions conclues entre la République Tunisienne et les pays étrangers, la durée totale accordée au travailleur étranger ne doit pas dépasser une année renouvelable une seule fois[131].

131 En effet, la durée totale accordée au travailleur étranger peut dépasser deux années dans les cas suivants:

Les agents de nationalité étrangère exerçant dans une entreprise titulaire d'un marché, et ce conformément au nombre et au calendrier prévus par le marché

Les agents de nationalité étrangère détachés par la société mère auprès de sa filiale en Tunisie;

Les représentants des agences de voyages après avis du ministère chargé du tourisme;

Les agents de nationalité étrangère exerçant dans le secteur des transports maritimes et aériens (suivant le régime de réciprocité);

Quant aux personnes concernées par l'attestation de non soumission au visa du contrat de travail, ce sont:

- Les étrangers ayant la qualité d'employeur
- Les Personnes étrangères travaillant pour le compte des associations à but non lucratif
- Les ressortissants Marocains et Algériens (employeurs et salariés)
- Les salariés exerçant sous l'un des régimes couvrant certains secteurs d'activités[132] **[TAB 23].**

Tableau 23 - Travailleurs étrangers en Tunisie

	2000	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
contrats de travail avec visa	3091	2939	3094	2658	2746	2765	2871	3468	3738
Non soumis aux visas de contrôle de travail	3199	2662	3433	2866	3255	3022	3586	3418	3719
Total	**6290**	**5601**	**6527**	**5524**	**6001**	**5787**	**6457**	**6886**	**7457**

Source: Ministère de l'Emploi

Le total des travailleurs étrangers a évolué depuis 2000 avec une moyenne annuelle de 6000 environ avec une tendance à **l'augmentation** passant de 6290 en 2000 à 7457 en 2008 (**plus 18,5%**). La répartition entre les deux régimes (contrat et non soumis à contrat) est en gros la même 50% - 50%. La répartition par pays d'origine des travailleurs étrangers en Tunisie montre pour l'année 2008 que le la **France arrive au 1er rang** 1803 sur 7457 soit 24% suivie par ceux venant d'Italie 16,1%, les autres pays européens (Allemagne 4%, Angleterre 2,5% Belgique 1,9% Portugal 0;9% Roumanie 0,5%) totalisent 9,8%

Les pays arabes notamment l'Algérie (3,6%) et le Maroc (12,8%) représentent 21,5% du total.Enfin il y a lieu de noter la présence de Chinois (2,9%) de Turcs (3%), d'Africain (1,8%) (Sénégal 0,9% plus côte d'ivoire 0,9%) d'américains du nord 1,9% (Etats-Unis (0,8%) Canada (0,4%)).

Les agents de nationalité étrangère exerçant dans les organisations et institutions internationales;

Les entraîneurs, les joueurs et les sportifs;

Le personnel exerçant dans le cadre de la coopération technique;

Les conjoints de tunisiens père ou mère d'un enfant tunisien résidant en Tunisie.

L'attestation de non soumission au visa du contrat de travail pour un travailleur étranger.

Les entreprises totalement exportatrices visées à l'article 18 de la loi n° 93-120 du 27 décembre 1993 portant promulgation du code d'initiations aux investissements.

Ces entreprises sont autorisées à recruter des agents de direction et d'encadrement de nationalité étrangère, dans la limite de quatre personnes pour chaque entreprise.

Les entreprises installées dans les Parcs d'Activités Economiques (ex-zone Franches Economiques)

Les banques et les organismes financiers visés par la loi n°85 - 108 du 06 décembre 1985 portant encouragement d'organismes financiers et bancaires non résidents peuvent embaucher librement du personnel d'encadrement étranger

Les sociétés pétrolières exerçant des activités de prospection et de recherche des hydro captures. Ces sociétés sont autorisées à recruter librement un personnel d'encadrement de nationalité étrangère.

Les sociétés, exerçant des activités de prospection, de recherche et d'exploitation minière. Ces sociétés sont autorisées à recruter de personnel d'encadrement de nationalité étrangère, et ce, après information du ministère chargé de l'emploi, ainsi les entreprises totalement exportatrices peuvent recruter des agents de direction et d'encadrement de nationalité étrangères dans la limite de quatre personnes pour chaque entreprise après information du ministère de l'emploi et de l'insertion professionnelle des jeunes. Au-delà de cette limite, les entreprises doivent se conformer au programme de recrutement et de tunisification préalablement approuvé par le Ministère de l'emploi.

La présence européenne est donc conséquente: 54% pour l'année 2008. S'agissant comme précisé d'actifs hautement qualifiés (niveau supérieur) [133] leur poids tout en étant encore faible (mais croissant) n'est pas non plus marginal, leur incidence sur le marché du travail des compétences est suivi avec attention, d'autant que la libéralisation des services est à l'ordre du jour dans les négociations en cours entre la Tunisie et l'U.E.

3.4. Les défis pour le marché du travail

Par delà les contraintes démographiques déjà mises en évidence il faut souligner qu'au cœur du marché de l'emploi en Tunisie il y a de fait une double distorsion:

1. une demande d'emploi (par les employés potentiels) non satisfaite.
2. une offre d'emplois (par les employeurs) non satisfaite;

Les données de l'ANETI permettent saisir ce double phénomène [**TAB 24**].

Tableau 24: Offres - Placements - Demandes d'emploi

Désignation	2000	2001	2002	2003	2004	2005	2006	2007
Offres d'emploi	93535	105003	105732	127320	145661	140673	138177	142042
Placements	75995	83917	87177	107640	119332	118966	123366	124572
Offre - Placement	17540	21086	18555	19680	26329	21707	14811	17470
Demandes d'emplois en fin décembre	71540	56835	75581	74522	83584	94954	100355	99213

Source: Indicateurs d'activités - ANETI

En comparant l'offre émanant des entreprises et enregistrée par l'ANETI depuis 2000, aux placements opérés par l'Agence on relève un reliquat de 20000 environ en moyenne et un taux de satisfaction moyen de 84%.

Parallèlement les demandes d'emploi (les employés potentiels) enregistrées en fin de mois (fin décembre), montre un effectif de près de 100000 récemment (avec une tendance à la hausse depuis 2004 en particulier).

Pour saisir la portée de ces chiffres, il faut à titre illustratif comprendre qu'en 2007 alors que 17470 offres d'emploi par les entreprises n'ont pas été satisfaites[134], à la fin de décembre 2007 se trouvent encore inscrits 99.213 demandeurs d'emploi (stock) dont la demande est non satisfaite.

Ce résultat permet de conclure, que dans les conditions actuelles, le marché du travail est inefficient. Comment gérer cette double distorsion et rendre le marché du travail plus efficient est un grand défi pour la Tunisie.

133 Compte tenue de l'acuité du chômage des diplômés du supérieur et de la prévalence de la logique de la préférence nationale, la relative percée des immigrés sur le marché du travail dans sa composante niveau supérieur ne manque pas de susciter quelques inquiétudes exprimés par les medias récemment.

134 Cela signifie qu'une partie de cette offre ait été satisfaite mais non enregistré par l'ANETI, soit que les demandeurs d'emploi pour cette offre sont inexistant soit qu'ils décident volontairement de refuser l'offre soit que les employeurs trouvent insuffisamment les compétences affichés par les demandeurs d'emploi.

Par ailleurs, en terme d'effectifs, ce sont les chômeurs de niveau primaire et secondaire qui constituent la plus grande partie 35% et 40% respectivement, soit 75% de chômeurs en 2007. Un ciblage approprié doit tenir compte du fait que les ¾ des chômeurs aujourd'hui, sont des jeunes, qui n'ont pas achevé le cycle primaire ou le cycle secondaire général ou professionnel, ou sont des diplômés du système de formation professionnel non encore insérés dans le marché du travail, faute d'une offre ou par manque de compétences correspondant aux besoins du marché.

De fait la qualité des formations depuis le primaire jusqu'au supérieur est interpellée ici. Comment remédier à l'inexistence d'une culture de l'interface Formation-Emploi tout au long des cycles de formation. Ceci est un autre défi qui appelle à une action globale tant au niveau du contenu des cursus que de l'information et l'orientation des jeunes.

4. Les politiques de l'emploi et les réformes du marché de travail

4.1. La politique de l'emploi

Les documents officiels sont:

- Note d'Orientation du XI^{ème} Plan et de la Décennie 2007-2017
- XI^{ème} Plan de Développement 2007-2011; Volume 1.

La politique de l'emploi est basée sur un ensemble d'axes focalisés essentiellement sur l'accélération du rythme de la croissance, la promotion de l'investissement, l'encouragement de l'initiative privée et de l'entreprenariat ainsi que sur le traitement actif du marché de l'emploi à travers l'institution et le renforcement d'un ensemble de programmes et d'instruments.

Comme spécifié dans les documents officiels, le plan d'action élaboré dans ce sens s'articule autour d'un ensemble d'éléments qui font de l'approche économique la composante fondamentale de la politique d'emploi et de maîtrise du chômage et ce à travers l'amélioration du contenu de la croissance, l'élévation du niveau de participation des entreprises économiques, dont en particulier les petites et moyennes entreprises, à l'effort d'emplois, le renforcement de la mise à niveau des ressources humaines et l'adaptation des programmes de formation aux besoins de l'économie.

Parallèlement à ces actions, le recours aux mécanismes de gestion active de l'emploi sera poursuivi en veillant à en assurer le meilleur déploiement et à en améliorer le rendement.

L'approche économique est ainsi articulée autour des objectifs suivants:

- Favoriser une croissance à fort contenu d'emploi;
- Assurer une meilleure adaptation des programmes de formation aux besoins de l'économie;
- Promouvoir la contribution de la petite et moyenne entreprise à la création d'emplois;
- Faire évoluer la méthode d'approche des interventions publiques au plan régional puis une meilleure réponse aux défis de l'emploi;
- Faire évoluer la fonction des observatoires relatifs au marché de l'emploi et au chômage;
- Plus et mieux prospecter les opportunités de placements à l'étranger.

La politique de l'emploi s'inscrit dans le schéma de développement tracé par le gouvernement.

Schéma de développement 2006-2016

	2002-2006	**2007-2011**	**2012-2016**
Croissance PIB aux prix du marché	4,6%	6,1%	6,5%
Emploi			
Demande additionnelle (1000)	80,3	87,2	87,2
Création d'emplois (1000)	74,4	85,6	105,8
Taux de satisfaction de la demande additionnelle	92,7%	85,6%	105,8%
Contenue emploi de la croissance	0.54	0.42	0.41
Chômage			
Taux de chômage global	14,2%	13,1%	10,3%
Chômage par niveau d'instruction			
Primaire et moins	13,8%	13,5%	10%
Secondaire	14%	12%	10%
Supérieur	16%	14,1%	11,3%

Source: Ministère du Développement

Dans quelles mesures ces objectifs ne seront-ils pas affectés par les retombées négatives probables de la crise mondiale ?

4.2. La crise mondiale et son impact sur la Tunisie

Il est impossible à l'heure actuelle de dresser un bilan complet et exhaustif des pertes jusque là subies par les entreprises tunisiennes opérant selon le régime général ou off-shore. Au plan officiel on ne nie pas les risques et les difficultés annoncés sur fond de crise que ce soit pour l'appareil exportateur, pour le rythme de croissance des Investissements Directs Etrangers ou pour l'agenda des intentions d'investissements en Tunisie ou sur l'emploi. D'où la série de mesures structurelles et conjoncturelles déjà entrées en application dont le programme de promotion de la compétitivité et de la capacité concurrentielle de l'entreprise tunisienne [une enveloppe de 450MDT du budget de l'Etat] et le programme de suivi des entreprises off-shore.

Pour le marché de l'emploi, les prévisions du 11ème plan (2007-2011) portent sur la création de 85.600 emplois annuellement pour absorber la demande additionnelle d'emplois, notamment, celle des nouveaux diplômés. Or, les réalisations se limiteront à 75.000 emplois selon les dernières déclarations officielles. Donc il y a un risque réel de la croissance du taux de chômage surtout que la croissance économique va plafonner à 3-4% selon certaines prévisions.

4.3. Les politiques actives de l'emploi

Les politiques actives d'emploi (PAE) en Tunisie constituent le principal instrument d'intervention des pouvoirs publics pour aider les chômeurs et surtout les *primo* demandeurs d'emploi à s'insérer dans le marché du travail.

Plusieurs intermédiaires interviennent dans la mise en œuvre des PAE. Ces intermédiaires peuvent être classés en 3 catégories:

1. les intermédiaires chargés directement du marché de l'emploi: l'Agence Nationale de l'Emploi et du Travail Indépendant (ANETI.)et la Direction Générale de l'Inspection du travail
2. les institutions de financement des programmes d'emploi: la Banque Tunisienne de Solidarité (BTS), le Fond National de l'Emploi (FNE 21-21) et la Caisse Nationale de Sécurité Sociale (CNSS).
3. les institutions de formation professionnelle: Agence Tunisienne de Formation Professionnelle (ATEP), les écoles de formation professionnelle dans l'hôtellerie et la santé publique, les centres de formation professionnelle dans l'agriculture et la pêche et les centre privés de formation professionnelle.

Les programmes des PAE en Tunisie peuvent aussi être classés en trois catégories

1 - Les programmes liée à la formation –insertion

Ces programmes concernent surtout les stages d'initiation à la vie professionnelle (SIVP), les contrats emploi formation (CEF) et les nouveaux instruments PC5O et PC7J gérés par l'ANETI ainsi que les instruments du Fonds National de l'Emploi 21-21.

2- Les programmes de promotion des micros entreprises

Stages d'Initiation à la Vie Professionnelle (SIVPI)

Ces stages sont destinés aux jeunes diplômés de l'enseignement supérieur ou ayant accompli avec succès le premier cycle de cet enseignement.

Stages d'Initiation à la Vie Professionnelle (SIVP2)

Ces stages sont destinés aux jeunes ayant accompli la 9ème année de l'enseignement de base, au minimum (3ème année de l'enseignement secondaire, ancien régime) ou ayant le niveau du premier cycle de l'enseignement supérieur.

Contrat Emploi-Formation (CEF)

Le contrat Emploi-Formation « CEF » cible:

Les jeunes ayant au moins le niveau de la 9ème année de l'enseignement de base accomplie (troisième année de l'enseignement secondaire, ancien régime) et titulaire d'un diplôme ou d'un certificat de fin de formation délivré par un établissement de formation professionnelle public ou privé;

Les jeunes ayant un niveau scolaire compris entre la 9ème année de base et la 4ème de l'enseignement secondaire et les jeunes sortants d'un centre de formation professionnelle agricole.

Depuis 2004, deux nouveaux instruments la subvention à l'embauche ont été crées en 2004, le PC50, sous forme d'une prise en charge par l'Etat pendant une année de 50% du salaire brut versé, dans la limite de 250 dinars par mois, et d'une exonération de la contribution patronale au titre du régime légal de sécurité sociale pour une durée de cinq ans. Cette mesure concerne tous les demandeurs d'emplois diplômés de l'enseignement supérieur y compris ceux ayant déjà bénéficié d'un stage d'initiation ou un cycle d'adaptation. Ce programme est géré par l'ANETI et financé par le FODEC. (Loi 2005-91 du 3 octobre 2005)

La subvention créée en 2004, PC75, sous forme d'une prise en charge par l'Etat pendant trois années à un taux dégressif variant de 75% du salaire brut versé à première année à 25% la troisième année, dans la limite de 250 dinars par mois en moyenne sur les trois années, et d'une exonération de la contribution patronale au titre du régime légale du sécurité sociale pour une durée de sept ans. Cette mesure concerne les demandeurs d'emploi **diplômés de l'enseignement supérieur à insertion difficile** ce programme est géré par l'ANETI.

Ces programmes agissent indirectement sur l'emploi en développant la demande de travail par les entreprises.

3- Les programmes de formation initiale et continue

Il serait fastidieux de présenter tous ces programmes, nous nous sommes concentrés sur ceux gérés par l'ANETI [SIVP, CEF] et ceux relevant du Fonds National de l'Emploi 21-21.

Les programmes gérés par l'ANETI [TAB 25]

- **Les SIVP 1**: En 2007, les bénéficiaires sont au nombre de 31357 soit une multiplication par plus de 4 depuis 2000. Le taux d'insertion moyen est de 32 % environ depuis 2000 (seulement 28% en 2003).
- **Les SIVP 2** touchent une population moindre 5750 en 2007 avec un doublement depuis 2000. Toutefois ici, le taux d'insertion est plus élevé 38% et en hausse au cours des dernières années (59,5% en 2003).

Les CEF ont concerné un nombre plus réduit de bénéficiaires 2874 en 2007, mais aussi avec un taux de réinsertion nettement plus élevé 44,5% et en hausse au cours des dernières années.

Tableau 25- Stage d'initiation à la vie professionnelle

SIVP 1	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**
Nombre total des bénéficiaires	7 738	6 902	7 236	9 913	13 378	18 488	25 381	31 357
Stagiaires insérés	2 234	3 308	2 150	3 481	3 924	5 296	6 813	8 756
Taux d'insertion	28,9%	47,9%	29,7%	35,1%	29,3%	28,6%	26,8%	27,9%
SIVP 2								
Nombre total des bénéficiaires	2 647	729	1 446	3 523	4 796	5 813	7 652	5 750
Stagiaires insérés	1 251	1 607	342	777	1 697	2 146	2 445	3 422
Taux d'insertion	47,3%	45,4%	23,7%	22,1%	35,4%	36,9%	32,0%	59,5%
Contrat Emploi Formation (CEF)								
Nombre total des bénéficiaires	1 704	460	1 494	2 701	3 357	2 701	2 913	2 824
Stagiaires insérés	962	933	248	842	1 439	1 562	1 407	1 492
Taux d'insertion	56,5%	49,3%	16,6%	31,2%	42,9%	57,8%	48,3%	52,8%

Source: Indicateurs d'activité, ANETI

Ainsi, par de là l'accroissement significatif des bénéficiaires au cours des 4 à 5 dernières années, le taux d'insertion varie de 32% à 44,5% en général.

Les programmes du Fonds 21-21 de l'Emploi [TAB 26]

Depuis sa création en 2000, le Fonds 21-21 a vu l'effectif des bénéficiaires presque tripler passant de 41505 en 2000 à 112391 en 2007. La part des diplômés du supérieur a aussi doublé de 11% à 22% entre 2000 et 2007.

Tableau 26 - Evolution du nombre des bénéficiaires du Fonds National de l'Emploi 21-21

	2000	2001	2002	2003	2004	2005	2006	2007
Nombre total des bénéficiaires	41 505	70 548	105 976	110 831	118 431	118 605	92 984	112 391
Dont niveau supérieur	4 576	5 792	5 560	7 802	8 061	14 468	17 667	25 155
Part (%)	11,03%	8,21%	5,25%	7,04%	6,81%	12,20%	19,00%	22,38%

Source: Indicateurs d'activité, ANETI

Une évaluation récente par la Commission Nationale de l'Emploi a montré que les programmes d'emplois gérés par l'ANETI ont touché l'équivalent de 80% d'une promotion annuelle des diplômés du supérieur contre seulement 30% au début des années 2000 [**TAB 27**]. Le taux d'insertion serait de 50% [3 ans après avoir bénéficié d'un programme]

Tableau 27 – Taux de couverture des nouveaux diplômés

	2001	2002	2003	2004	2005	2006	2007
SIVP1	6747	7122	9522	12737	17768	23900	30841
Total des bénéficiaires	7396	7972	10339	16783	21186	34450	46360
Taux de couverture des nouveaux diplômés	34%	28%	30%	42%	43%	61%	79%

Cette évaluation a aussi montré que ce sont les diplômés des établissements les plus renommés et les plus sélectifs à l'entrée qui enregistrent les taux d'utilisation des programmes d'emploi les plus élevés. Parmi les diplômés de l'enseignement supérieur, plus des 3/4 des diplômés viennent des facultés de Médecine, de Pharmacie, de l'ENSI, de l'ENIT et de HEC bénéficient d'une insertion aidée grâce aux programmes d'emploi. Par contre, moins de 1/4 de diplômés des facultés des Sciences et celles des Lettres et Sciences Humaines ont accès à ces programmes.

Le SIVP et les PC se présentent comme instruments de facilitation d'accès des nouveaux en diplômés aux entreprises. Les instruments SIVP et PC50 ont une efficacité positive, c'est-à-dire que les bénéficiaires ont plus de chance de s'insérer que les non bénéficiaires mais ce ne sont donc pas des instruments pour traiter le noyau dur du chômage.

Concernant le Fonds de l'Emploi 21-21, l'évaluation de la Commission de la Consultation Nationale sur l'Emploi montre une faible insertion: 26%. Ils constituent plutôt des instruments d'attentes et non d'insertion. Ces instruments sont basés sur une logique d'offre de formation et non de demande économique. De plus, ces instruments semblent avoir une efficacité négative, c'est-à-dire que la difficulté d'insertion des bénéficiaires est plus élevée par rapport à ce qu'elle est en leur absence.

Financement et coût unitaire des programmes de soutien à l'emploi

Tableau 28 - Dépenses, coût unitaire des programmes du soutien à l'emploi

Désignation	2000	2001	2002	2003	2004	2005	2006	2007
SIVP 1 (Millions de dinars)	9,7	8,6	7,1	9,7	12,8	18	25,5	31,8
Nombre total des bénéficiaires	7 738	6 902	7 236	9 913	13 378	18 488	25 381	31 357
Coût unitaire (dinars)	1253,6	1246	981,2	978,5	956,8	973,6	1004,7	1014,1
SIVP 2 (Millions de dinars)	1,6	0,9	0,8	1,5	2,5	3	4	3,6
Nombre total des bénéficiaires	2 647	1607	1 446	3 523	4 796	5 813	7 652	5 750
Coût unitaire (dinars)	604,5	560,0	553,3	425,8	521,3	516,1	522,7	626,1
Contrat Emploi Formation (CEF) (Millions de dinars)	0,5	0,4	0,2	0,5	0,8	1,1	0,9	0,6
Nombre total des bénéficiaires	1 704	933	1 494	2 701	3 357	2 701	2 913	2 824
Coût unitaire (dinars)	293,4	428,7	133,9	185,1	238,3	407,3	309,0	212,5
Fonds National de l'Emploi (21-21) (Millions de dinars)	58,4	80	80	80	80	80	85	90
Nombre total des bénéficiaires	41 505	70 548	105 976	110 831	118 431	118 605	92 984	112 391
Coût unitaire (dinars)	1407,1	1134,0	754,9	721,8	675,5	674,5	914,1	800,8

Source: Données brutes Ministère de Développement et de la Coopération Internationale, Commissariat Général au Développement Régional et BCT

Le Tableau 28 donne des indications sur le montant des dépenses allouées depuis 2000 aux programmes de soutien à l'emploi que nous avons sélectionné.

- Au Fonds National de l'Emploi 21-21 est affecté un montant constant de 80 M DT/an de 2001 à 2005; depuis une hausse à 85M DT et à 90M DT en 2006 et 2007.

Compte tenu du nombre important des bénéficiaires (112391 en 2007), le coût unitaire moyen sur l'ensemble de la période est de 886 DT environ [450 euros].

- Le SIVP 1 s'est vu affecté des montants moindres mais en forte hausse passant de 9,7M DT à 31,8 M DT entre 2000 et 2007. Cela a suivi l'évolution forte du nombre des bénéficiaires, qui comme déjà souligné ont pratiquement quadruplé entre 2000 et 2007 [7738 en 2000 et 31357 en 2007].Le coût unitaire ici de 1091 DT [600 euros environ] en moyenne pour un taux d'insertion de 32%.

Quand on compare ce programme SIVP 1 à celui du Fonds National de l'Emploi, en terme d'efficience – (efficacité – coût), c'est-à-dire taux d'insertion - coût unitaire, ils sont dans une situation plus ou moins similaire [32% et 1051 DT; 27% et 886 DT].

- Les programmes SIVP 2 et contrats formation emploi CEF concernent des publics beaucoup moins nombreux [5720 pour le SIVP 2 et 2824 pour le CEF en 2007]. Les montants affectés à ces 2 programmes ont évolué nettement vers la hausse pour les SIVP2 passant de 1,6 M DT à 3,6 M DT entre 2000 et 2007. Le coût unitaire a été de seulement 541 DT en moyenne [300 euros environ] et un taux d'insertion de 38%.

Au programme CEF a été attribué un montant relativement faible 0,6 M DT en moyenne. Le coût unitaire a été de seulement 276 DT [150 euros environ] en moyenne sur la période (avec de forte fluctuation) et un taux d'insertion de 44,4% en moyenne.

Manifestement, ces 2 programmes le CEF en premier et le SIVP 2 ensuite ont les meilleurs rapports efficacité – coût: plus faible coût unitaire et plus forte insertion. Cet exercice sommaire d'évaluation montre la nécessité d'évaluation plus fine et plus systématique des P.A.E, en terme d'efficience, afin de réparer les carences et corriger ces programmes qui sont d'une grande importance dans le dispositif tunisien de régulation du marché du travail.

En conclusion, certes la Tunisie se prévaut d'une Politique Active d'Emploi (PAE) significative, toutefois:

- Les instruments de la PAE se caractérisent d'abord par une grande diversité et une accumulation depuis le début des années 2000.
- Cette complexité pose des problèmes de lisibilité, de double emploi, de coordination et de pertinence des programmes par rapport à la structure du chômage.
- Il n'existe pas de processus régulier et rigoureux d'évaluation de leur efficience et de leur équité.
- Ces programmes visent sans distinction les demandeurs d'emploi et ne ciblent pas les demandeurs d'emploi en difficulté d'insertion.

Sur la base de ces évaluations, une nouvelle Stratégie pour l'Emploi[135] est mise au point très récemment par le Ministère de l'emploi et de l'insertion professionnelle des jeunes; elle vise la restructuration des différents programmes actifs de l'emploi.

135 Elle est en stade final d'élaboration en vue d'une mise en service effective très prochaine.

Plusieurs axes ont été retenues et ayant pour objectifs de:

- Réduire à six les PAE.
  SIVP (stage d'insertion à la vie professionnel de diplômés),
  Contrats d'insertion pour les chômeurs de longue durée,
  Contrats de mise à niveau et d'insertion professionnels pour autres que diplômés du supérieur,
  Contrats de mise à niveau et réinsertion des licenciés,
  Programme de soutien et d'accompagnement des jeunes promoteurs,
  Contrats emploi solidarité (opération spécifique dans le cadre de la promotion d'initiatives locales et régionales).
- Simplifier les procédures pour les bénéficiaires,
- Lier la mise à niveau formation à l'insertion au sein de l'entreprise,
- Orienter les entreprises à s'engager pour insérer le maximum possible de bénéficière,
- Donner plus prérogatives aux régions pour la mise en place des PAE,
- Intensifier les PAE pour les chômeurs de longue durée.

Cette nouvelle stratégie sera donc prochainement à l'œuvre en Tunisie, une évaluation ultérieurement permettrait de savoir dans quelle mesure l'efficacité des PAE sera améliorée d'une manière significative. En tout état de cause, l'expérience tunisienne demeure singulière dans la région.

4.4. Réformes du code de travail: productivité, emploi et salaire

Dans la section II, nous avons mis en évidence les caractéristiques de la législation sociale et son évolution.

L'année 1996 peut être considérée comme une date décisive dans la mise en application du nouveau code de travail. Pour estimer l'effet de ce changement opéré en 1996 sur la productivité, l'emploi et le salaire moyen, nous avons considéré l'évolution de ces paramètres de 1990 à 1995, de 1996 à 2001 et de 2002 à 2007 [toutes choses étant égales par ailleurs car l'imputation reste toujours sujette à caution].

- **La productivité avant et après 1996:** La croissance de la productivité du travail a été de 2% en moyenne pour 1990-95; 3% de 1996-2001 et 2,3% entre 2002 et 2007. Ainsi, la productivité a cru à un rythme supérieur à partir de 1996, avec toutefois une décélération depuis 2002.
- **La croissance de l'emploi depuis 1996:** On relève un léger accroissement du rythme de création d'emplois: 2,33% pour 1990-95; 2,39% pour 1996-2001 et 2,43% de 2002 à 2007.
- **La croissance du salaire moyen depuis 1996:** Ici l'on constate une croissance du salaire moyen depuis 1996: de 2,12% à 2,54% entre les périodes 1990-95 et 1996-2001; depuis, une décélération se produit puisque le rythme de progression du salaire moyen baisse à 1,57% entre 2002 et 2007.

Ainsi, avec toutes les précautions d'usage concernant l'imputation des évolutions de la productivité, du salaire moyen et de l'emploi au changement du Code de Travail en 1996, on relève un effet positif dans la période suivant l'année 1996 [1996-2001] qui diminue d'intensité à partir de 2006.

Quant à l'emploi, il croît certes après 1996, mais faiblement.

4.5. Politique de l'emploi: impératifs et options

La Tunisie peut se prévaloir d'avoir:

- Une politique de l'emploi
- Une stratégie nouvelle en matière de programmes actifs de l'emploi

La Tunisie dispose par ailleurs:

- D'une Agence chargée de la régulation du marché du travail [l'ANETI]
- D'un observatoire de l'emploi et des qualifications fournissant une base de données fiable

Toutefois, compte tenu des pressions persistantes au niveau du marché du travail, plusieurs impératifs s'imposent à la Tunisie pour relever les défis présentés précédemment. Quels sont ces impératifs ? Et quelles sont les options alternatives ?

Au plan macro-économique et institutionnel

Il s'agit du passage à un palier de croissance plus élevée et plus employant. Cet impératif exige l'amélioration significative du climat des affaires en terme de gouvernance économique [Efficacité de l'administration et Qualité de la Réglementation] et de gouvernance institutionnelle [Etat de Droit, Contrôle de la corruption]. Seuls des progrès significatifs dans ces domaines clés pourraient **libérer le potentiel d'investissement privé national** et permettra une attraction significative et ciblée des investissements directs étrangers pour stimuler la croissance.

Au plan social

Il s'agit de l'option pour un nouveau compromis social gagnant – gagnant entre les partenaires sociaux, pour une flexi-sécurité, levant les rigidités en matière de licenciement, et garantissant les risques pour les employés par la mise en place d'un dispositif d'assurance contre le chômage. **Au niveau de la régulation du marché du travail,** l'ANETI doit se doter des capacités institutionnelles de gérer la double non-correspondance entre l'Offre et la Demande par un **profilage des excédents et de déficits.** La coopération avec les partenaires européens est de mise.

Au plan micro

L'impératif « sociétal » est l'ancrage d'une Culture entrepreneuriale à même d'accélérer le rythme de création d'entreprises. De plus, les acteurs publics doivent contribuer à faire épouser par les entreprises un nouveau modèle de compétitivité qui n'est plus basé sur le faible coût salarial, mais sur la valorisation de la ressource humaine et l'accroissement de la productivité.

Au plan sectoriel, l'option pour une réforme globale du système d'éducation et de formation est indiscutable. En effet, une politique de l'emploi doit par nécessité être articulée à une politique d'éducation et de formation. Sans articulation logique, sans mise en cohérence entre elles, il est peu probable que la Tunisie réussisse à relever les défis de l'employabilité de ses jeunes.

Ce constat recentre la problématique de l'employabilité des jeunes à tous les niveaux du système d'éducation et de formation. Cela est au cœur des carences en terme d'efficacité interne (problème des redoublements et des abondons, en particulier) à tous les niveaux et en particulier du primaire et du secondaire, et d'efficacité externe (non insertion dans le marché du travail).

Enfin, et c'est ce que nous verrons, il s'agira de mettre en place une politique migratoire pro-active en tant que composante de la politique de l'emploi.

5. Emigration et marché du travail

5.1. Estimation et caractéristiques de l'émigration

5.1.1. La colonie Tunisienne à l'étranger [le stock] [TAB 29]

En 2008, selon les services consulaires tunisiens la communauté tunisienne à l'étranger est évaluée à 1.057.797 dont 64% d'hommes et 36% de femmes. 82,8% de cette communauté réside au sein de l'U.E, 14,5% dans les pays arabes, le reste en Amérique (2,6%) en Asie Australie 0,2% et en Afrique 0,1%. La France, avec 54,6% du total vient au premier rang, suivie par l'Italie 13,4% et l'Allemagne 7,8%. Pour les pays arabes, la Libye représente 7,9% et les pays du Golfe (Arabie Saoudite comprise) 4,2%.

La répartition de cette communauté entre actifs (occupés) et inactifs +chômeurs donne 52% pour les premier et 48% pour les seconds. Au sein des actifs 80% sont des ouvriers ou employés (près de 41% du total). 11% exercent dans les professions libérales et 9% sont de cadres. La présence de ces dernières catégories en proportion, est plus élevée dans les pays arabes.

Enfin il est à remarquer que les inactifs (femmes au foyer, malades…) et chômeurs comptent pour 37% (17,7% du total) 21% en âge prés scolaire (10% du total) 33% de lycéens (15,8% du total) les étudiants 8% (45246, soit 4,3% du total des émigrés tunisiens).

Tableau 29 - Répartition de la colonie tunisienne par destination, 2008

	Actifs	Inactifs ou sans occupation	femmes	hommes	total	% total
UE	432 574	431 960	319 654	554 293	873 947	82,6%
Total pays arabes	90 876	56 454	46 808	106 448	153 256	14,5%
Amériques	18 387	9 260	10 582	17 065	27 647	2,6%
Asie-Australie	1 231	659	665	1 225	1 890	0,2%
Afrique	703	354	282	775	1 057	0,1%
100,0%	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%

Source ministère des affaires étrangères

En suivant l'évolution de cette communauté tunisienne à l'étranger, on constate qu'elle est passée de 603.300 en 1995 à 698.108 en 2000 et à 1018.173 en 2007, soit une croissance annuelle moyenne de 4,5% de (6,7%) de la population totale en 1995 et 10% en 2007.

En terme de répartition par pays destinaire, ce qu'il y a lieu de souligner est la prépondérance continue de la France, plus de la moitié, avec une tendance légère à la baisse toutefois 58% en 1995, 54,5% en 2007. C'est l'Italie qui a connu l'évolution la plus remarquable 40000 tunisiens en 1995 et 142972 en 2007: de 6,8% du total en 1995 elle représente 14% en 2007. L'Allemagne en $3^{ème}$ position gagne 2,4 points (de 5,5% à 7,9%). Au contraire de la Libye et de l'Arabie Saoudite qui ont vu leurs poids en terme de destination des tunisiens baisser de 9,3% à 7,6% pour la première et de 2,7% à 1,9% pour la seconde. Les autres pays ont vu aussi leur proportion décliner de 17,9% à 14% entre 1995 et 2007.

Evolution de la communauté tunisienne à l'étranger par pays

	1995	2000	2001	2002	2003	2004	2005	2006	2007
France	350 000	436 461	470 549	480 067	493 028	511 176	535 608	551 668	555347
Allemagne	33 000	41975	44143	45904	53925	56043	70349	72112	80336
Italie	40000	62999	78581	89896	101042	112289	113845	127059	142972
Libye	56000	43919	47751	53601	60023	67269	71522	71522	77877
Arabie saoudite	16500	16102	21289	13188	19217	15472	18150	18250	19214
Ensemble Général	**603300**	**698108**	**763980**	**793880**	**843204**	**884866**	**933944**	**973140**	**1018173**

Source: Tunisie – Ministère des Affaires Etrangères

5.1.2. Le solde migratoire [Les flux]

Les composantes de l'accroissement de la population

L'accroissement de la population présente deux aspects à savoir l'accroissement naturel et la population et le solde migratoire. L'accroissement naturel de l a population est la différence entre les naissances vivantes et les décès c'est-à-dire entre la natalité et la mortalité. Ainsi l'accroissement de la population désigne la différence entre la taille de la population à la fin et au début d'une période. Il est égal à la somme algébrique de l'accroissement naturel et du solde migratoire. L'accroissement est dit négatif lorsque les deux composantes sont négatives ou lorsque l'une est négative et a une valeur absolue supérieure à celle de l'autre.

Le solde migratoire désigne donc la différence entre l'immigration et l'émigration survenue dans une zone géographique pendant une année donnée (le solde migratoire est donc négatif lorsque les émigrants sont plus nombreux que les immigrants). La plus part des pays ne disposant pas de chiffres précis sur l'immigration et l'émigration, voire ne disposant d'aucun chiffre, le solde migratoire est estimé en calculant la différence entre l'accroissement de la population et l'accroissement naturel entre deux dates. En Tunisie, le solde migratoire est positif de 1990 à 1999 avec un chiffre record en 1990 suite au retour massif de tunisien en raison de la 1ère guerre du golfe: +84974. Il a oscillé entre + de 3000 et +9000 grosso modo entre 1991 et 1998, et une pointe de +16.694 en 1995. **Depuis 2000, le solde devient négatif signe d'une reprise manifeste de l'émigration.**

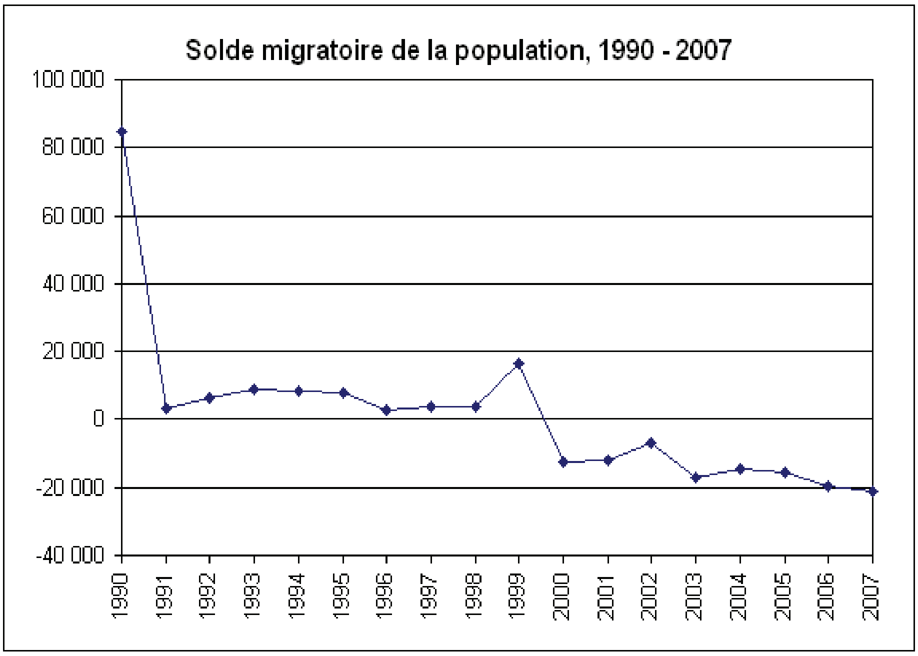
La moyenne annuelle entre 1999-2004 est de -7753 (l'année 1999 est incluse avec + 16694). De fait entre 2000-2004 le solde est de -12642 il est de -17587 en 2005-2006 et -20354 en 2005-2007 [**TAB 30**].

Tableau 30 - Solde migratoire calculé

	1999 - 2004	2005 - 2006	2006 - 2007
Solde migratoire	-46 517	-35 174	-40 709
par an	-7 753	-17 587	-20 354

Source: Données brutes, INS

Par comparaison avec les donnés de l'INS (Recensement général de 2004 et Enquête population



emploi en 1999, 2005-2006-2007-2008), il y a quelque écarts mais qui n'influent pas sur la tendance.

(moyenne annuelle)	1999-2004	2005-2006	2006-2007
Solde de migration calculé	-7753	-17587	-20354
Solde migration recensée	-11600	-16320	-14340

5.1.3 Caractéristiques des émigrés

- Par sexe, les hommes représentent 82% des émigrés.
- Par pays de destination la France arrive en 1ère place 40% en moyenne suivie par l'Italie 25%. Les deux pays totalisent 75% de l'émigration depuis 1999 jusqu'à 2007.Les pays Arabes représentent 19% (dont la Libye 8,2%) et le reste des pays 6% environ.
- Par tranche d'âge, celles des 15-29ans: (57%) et 30-44ans (32%) représentent ensemble 89% des émigrés
- Par niveau d'instruction en 2005-2006 les analphabètes représentent 3,3%, ceux de niveau primaire (34,5%), secondaire (48,1%). La proportion des émigrés de niveau supérieur et de 14,1%. Les exclus du primaire et encore plus du secondaire comme nous l'avons vue constituent le gros des effectifs, des chômeurs et des émigrés.

Emigrés Tunisiens par tranche d'âge et par sexe

Tranche d'âge Période	Avril 99 - Avril 04	Mai 05 Mai 06	Mai 06 Mai 07
Sorties			
0-14	680	1.330	1.050
15-29	41.350	19.740	12.900
30-44	27.000	7.890	6.550
45-64	5.340	1.740	2.030
65& +	330	480	600
Non spécifié	-	-	-
Total	**75.770**	**31.180**	**23.130**

Source: Institut National de la Statistique –Tunisie; En date du 11/07/2008

Emigrés tunisiens selon les pays de destination 1999-2007

Période	Avril 99 - Avril 04	Mai 05 Mai 06	Mai 06 Mai 07
Sorties			
France	31.960	9.730	10.180
Italie	16.970	10.160	4.950
Autres pays européens	10.580	2.130	2.320
Libye	5.370	3.010	2.320
Autres pays arabes	5.560	4.590	2.820
Autre pays	5.330	1.560	540
Total	**75.770**	**31.180**	**23.130**

Source: CARIM

Emigrés, entre mai 2005 et mai 2006, selon le niveau d'instruction et le sexe

Niveau d'instruction	Effectifs Masculin	Effectifs Féminin	Effectifs Ensemble
Néant	700	300	1000
Primaire	8800	1700	10500
Secondaire	11500	3200	14700
Supérieur	2600	1700	4300
Total	**23600**	**6900**	**30500**

Source: Enquête annuelle auprès des ménages sur la population et l'emploi.

5.1.4. Type d'émigration

*5.1.4.1. L'émigration contrôlée [**par l'Agence Nationale de l'Emploi et du Travail indépendant ANETI et de l'Agence Tunisienne de la coopération technique ATCT**]*

5.1.4.1.1. L'émigration contrôlée par l'ANETI

Parmi les missions de l'ANETI: organiser les opérations de placement de la main d'œuvre tunisienne à l'étranger et de veiller à leur réalisation.

A – L'émigration d'emploi [TAB 31]

Tableau 31 – Evolution des placements des travailleurs tunisiens selon la nature du contrat

Année	2002	2003	2004	2005	2006	2007	2008
Saisonnier	751	678	942	907	736	752	1079
Permanent	391	346	292	358	296	868	1294
Total	1142	1024	1234	1265	1032	1620	2373

Source ANETI

Il y a deux types de contrats: saisonnier et permanent.

L'évolution depuis 2002 jusqu'à 2008: il y a 9510 au total soit **une moyenne annuelle de 1358 avec une tendance à l'accroissement en 2008,** résultat entre autre de la mise en application de l'accord signé avec la France. De 2002 à 2006 la part des placements des travailleurs saisonniers était prépondérante (de 65 à 70%). En 2007 et 2008 la part des permanents augmente pour présenter 56% environ. Ainsi **l'on assiste très récemment à une augmentation des placements de Tunisiens à l'étranger et des permanents en particulier**. Pour les années 2005, 2006,2007et 2008, la répartition des placements par pays selon la destination montre la prépondérance de la France: 62,2% en moyenne [**TAB 32**].

Tableau 32 - Placements à l'étranger par destination

	2005	2006	2007	2008
La France	1019	807	876	1214
L'Italie	98	60	375	284
Arabie saoudite	119	114	227	305
E.A.U	7	-	103	214
Autres	38	39	39	176
Total	**1281**	**1011**	**1620**	**2193**

Source: ANETI

L'Italie vient en seconde position 11,6% talonnée par l'Arabie Saoudite 11,2% Récemment les Emirats Arabe Unis en 2007 et 2008 ont représenté 6,3% et 9%. En 2008, Qatar, Koweït, Oman et Bahreïn ont totalisé 167 placements soit 7,6% du total en 2008. **Sachant la prépondérance des relations bilatérales en matière de migration, il est important de relever l'importance des évolutions avec la France et l'Italie en particulier.**

Un nouveau accord avec la France (2008) … promoteur ?

L'accord tuniso-français relatif à la gestion concertée de migrations et au développement solidaire a pour objectifs de:

- Faciliter la circulation des personnes entre la France et la Tunisie, notamment par une délivrance plus large des visas dits de circulation d'une durée de un à cinq ans.
- Faciliter l'accès au marché du travail français pour les tunisiens qui **ont des compétences de haut niveau ou pour les métiers pour lesquels existe en France une demande non satisfaite**. Ces

facilités devraient permettre chaque année l'entrée en France de plus de 9000 professionnels tunisiens:

  - Titulaires de cartes « compétences et talents »
  - Titulaires d'un contrat de travail dont la qualification professionnelle correspond à une liste de 77 métiers pour lesquels le marché de l'emploi français est totalement ouvert aux ressortissants tunisiens.
  - Jeune professionnels disposant de qualification professionnelle entrant dans le cadre de l'accord tuniso-français du 4-12-2003.
  - Travailleurs saisonniers.

- Appuyer les actions de développement solidaire entre les deux pays essentiellement par le biais de trois moyens:
  - Développer la formation professionnelle qui débouche sur l'embauche dans les métiers traditionnels ou nouveaux.
  - Mobiliser les compétences tunisiennes en France autour de projets de coopération technique, technologique, scientifique ou éducative en Tunisie.
  - Contribuer au développement des régions tunisiennes d'émigration pour créer des activités et des emplois répondant à la situation locale.
  - Lutter contre l'émigration irrégulière au travers d'une coopération opérationnelle bilatérale destinée à la prévention pour les procédures de réadmission des personnes en situation irrégulière dans le respect de leur dignité et de leurs droits fondamentaux.

Il est trop tôt d'évaluer la portée de cet accord. Toutefois, au plan officiel, on affiche une satisfaction et un optimisme partagés.

Des blocages avec l'Italie

Devenue deuxième pays d'immigration des tunisien, l'Italie a été, au début des années 2000, le principal pays de la migration contrôlée pour les tunisiens. Un système de quotas introduit par la loi italienne de 1998 a ouvert la voie à partir de 2000 à la mise en œuvre d'un mécanisme d'émigration dite « régulée et organisée ». Les quotas sont fixés annuellement par la partie italienne (par un texte réglementaire, dit « Decretto Flussi ». Pour la Tunisie, le quota annuel était de 3000 porté à 4000 pour par la suite.

Les résultats ont été plutôt positifs et au-delà des attentes au cours des 2 premières années puis ont connu une régression continue pour s'établir à un niveau très bas et ce en raison des dispositions de la loi Bossi-Fini. Avec la loi Bossi-Fini de 2002, d'importantes restrictions sont entrées en vigueur. L'admission en Italie pour raisons d'emploi est désormais conditionnée par la possession d'un contrat nominatif d'emploi approuvé par les services compétents italiens et la justification d'un logement. Ces nouvelles mesures ont considérablement réduit les possibilités de placement en emploi des tunisiens dans ce pays en dépit du quota annuel de 4000 emplois accordés à la Tunisie.

En définitive, le quota accordé annuellement par l'Italie à la Tunisie sert en pratique, compte tenu des restrictions imposées, à régulariser la situation de tunisiens résidant de manière irrégulière en Italie (20.000 selon les italiens).

B - L'émigration familiale contrôlée (le regroupement familial)

L'évolution depuis 2002 montre un flux moyen annuel de 2203 personnes avec une tendance à la baisse en fin de période (1409 seulement en 2008). La France concentre la quasi-totalité de l'émigration familiale 99%. De fait pour la France en si on additionne l'émigration pour l'emploi et l'émigration familiale depuis 2002, soit donc l'émigration totale, la moyenne par an depuis 2002 est de 3000 avec une baisse relative depuis 2006.

Emigration totale vers la France

Année	2002	2003	2004	2005	2006	2007	2008
Effectif	3254	3485	3375	3429	1891	8762	2786

En conclusion, l'émigration totale contrôlée (tous pays) par l'ANETI serait en moyenne de 4000 environ (3972). La part de l'émigration pour l'emploi représente en moyenne 34% avec un relèvement significatif en 2007 et 2008: 40% et 60%.

Emigration totale contrôlée tous pays par l'ANETI

Année	2002	2003	2004	2005	2006	2007	2008
Effectif	3648	3816	3602	3663	3085	3509	3602

Source ANETI

La tendance récente indique que l'émigration pour l'emploi est en train de prendre le pas sur l'émigration familiale qui a prévalu jusqu'à alors.

5.1.1.2. L'émigration contrôlée par L'Agence Tunisienne de la Coopération Technique (ATCT)
Le total cumulé depuis 2002 s'élève à 11.177 soit 1.596 en moyenne par an; avec une baisse enregistrée en 2004-2005 et une relative reprise en 2005-2008 en particulier. Selon l'ATCT la moyenne annuelle de placements à l'étranger a été de 700 entre 1992-1996 et 1400 entre 1997-2001, elle s'est relevée à près de 1600 entre 2002-2008. A la date du 11/02/2008, 10 019 tunisiens sont placés par l'ATCT (stock).

L'évolution depuis 2002

Année	2002	2003	2004	2005	2006	2007	2008
Effectif	1539	1457	1221	1270	1993	1629	2058

Source ANETI

Les pays arabes (du Golfe quasi exclusivement) représentent 81,6% des placements de l'ATCT. L'Europe avec 7,7% vient loin derrière suivi par les organisations internationales 4,4%. L'Amérique 3,8% et l'Afrique 2,1%. Les autres destinations sont marginales.

Les secteurs enseignants –sport (37%) et santé (26,5% arrivent en tête, de domaine déplacements. L'électricité – mécanique 9,2%, l'administration 8,8% et le tourisme 7,7% totalisant ensemble 25,7%. Ainsi les 5 secteurs concernent la quasi-totalité de placements 90%. En grande majorité, il s'agit de cadres moyen et supérieur.

Il faut préciser un point important est que l'ATCT reçoit en moyenne 200 offres par an en moyenne représentant 3000 emploi. Son taux de réalisation est seulement de 40%. Au total, l'ensemble de l'émigration pour l'emploi (ANETI-ATCT) s'élève donc à une moyenne de près de 3000 (2954), si l'on ajoute l'émigration familiale 2203 par an en moyenne on parvient à un total de 5157 en moyenne.

5.1.5. L'émigration non contrôlée

A – Une estimation

Une partie difficile à estimer de l'émigration régulière échappe au contrôle des organismes publics de placement [ANETI, ATCT) et donc aux statistiques: procédures individuelles de placement ou par les agences privées encore non réglementées en Tunisie. Ceci étant précisé et avec toutes les précautions d'usage nécessaire, si nous comparons l'émigration contrôlée (ANETI +ATCT) à l'émigration nette (solde migratoire calculé), le reliquat représenterait le potentiel de l'émigration irrégulière soit une dizaine de milliers environ en moyenne par an entre 2003-2004-2005. Depuis les statistiques indiquent une forte hausse 15000 en moyenne pour 2006 et 2007.

En tout état de cause, on peut raisonnablement estimer à plusieurs milliers en moyenne par an l'émigration irrégulière avec probablement une hausse depuis 2006. D'autres sources nous confortent dans cette hypothèse. Le nombre de tunisiens arrivés de manière illégale en Italie a beaucoup augmenté. En 2008 ils étaient selon l'OIM, 6799 au lieu de 1139 en 2007. Des sources du Ministère tunisien de l'Intérieur indiquent par ailleurs qu'environ 8000 avaient été empêchés de franchir illégalement les frontières tunisiennes en 2008. Les sources officielles italiennes évaluent à 20000 environ les tunisiens se trouvant en situation irrégulière en Italie. 10800 cas pourraient être le volume de l'émigration irrégulière ou illégale au cours de la période avril 2003 à avril 2004. Cette estimation est basée sur trois grandeurs bien comparables, puisque les évaluations ont eu lieu, toutes les trois, à la même date, soit fin avril 2004[136].

B - Le profil des primo émigrants clandestins

- **Le sexe des émigrants clandestins:** Malgré une légère mixité enregistrée depuis quelques années, la migration clandestine reste majoritairement masculine.
- **L'âge:** Les candidats à l'émigration clandestine en Tunisie sont majoritairement jeunes âgés de 20 à 40ans, une tranche d'âge des plus touchées par le problème du chômage. En revanche les enfants mineurs, qui tentent d'émigrer clandestinement sont rares à l'heure actuelle. Ils émigrent souvent en compagnie de leurs parents.
- **Le niveau d'instruction**: Contrairement aux premiers migrants qui étaient analphabètes ou ayant un niveau de formation professionnelle très bas, les candidats actuels à l'émigration clandestine sont de plus en plus éduqués avec une proportion de diplômés des écoles de formation professionnelles ou autres. Les bacheliers ainsi que les maîtrisards deviennent de plus en plus nombreux parmi les candidats. Le chômage des diplômés maintient des dizaines de milliers de jeunes dont la précarité ce qui a constitué au bout de quelques années une pépinière pour cette forme de migration. Depuis quelques années les jeunes diplômés de l'enseignement supérieur au chômage viennent peser sur le stock humain de cette migration.

5.2. Impacts de l'émigration

5.2.1. Les transferts des émigrés tunisiens (les tunisiens résidant à l'étranger TRE)

La Banque Centrale de Tunisie décline au plan statistique les transferts des TRE sous le poste: Revenus du travail R.T.

136 Habib Fourati: de la migration irrégulière des tunisiens à la migration irrégulière des étrangers à travers la Tunisie: une tentative d'estimation; 2008.

	Apports en Espèces		Apports en nature		
Année	**(MD)**	**%**	**(MD)**	**%**	**Total**
1990	442	84,03%	84	16,00%	526
1991	472	89,56%	55	10,40%	527
1992	407	80,12%	101	19,90%	508
1993	450	75,00%	150	25,00%	600
1994	499	71,70%	197	28,30%	696
1995	546	76,69%	166	23,30%	712
1996	592	74,19%	206	25,80%	798
1997	616	72,81%	230	27,20%	846
1998	676	74,94%	226	25,10%	902
1999	732	71,76%	288	28,20%	1020
2000	810	74,24%	281	25,80%	1091
2001	1014	76,01%	320	24,00%	1334
2002	1124	73,85%	398	26,10%	1522
2003	1216	75,48%	395	24,50%	1611
2004	1346	75,49%	437	24,50%	1783
2005	1391	76,98%	416	23,00%	1807
2006	1537	76,47%	473	23,50%	2010
2007	1681	76,44%	518	23,60%	2199
		76,43%		23,57%	

Source: BCT

Ces revenus du travail s'élevaient à 2,2 milliards DT en 2007 contre 0,5 milliard en 1990, à dinars courants, la croissance moyenne par an a été de 12,7% entre 1994 et 2007. Evaluées en euros (élimination de l'effet du taux de charge) en 2000 les transferts s'élevaient à 853 millions d'euros et en 2007 à 1.223 millions d'euros soit une augmentation de 43,3% (6,2%) en moyenne par an (10,5% à dinars courant).

Les transferts des TRE sont soit en espèces, soit en nature la part moyenne des premiers est de 23,6% contre 76,4% pour les seconds. Par pays d'origine des transferts, l'U.E. représente l'essentiel: 85% en moyenne.La France représentant la moitié environ de l'ensemble des transferts et l'Italie et l'Allemagne 14% -15% chacun en moyenne.

La contribution de ces transferts rapportée au PIB est de 4,5% en moyenne et au niveau de la balance des payements (BDP) elle est appréciable: près de 10% en moyenne des recettes de la BDP et 30% à 40% du défit commercial.

5.2.2. Les projets des tunisiens résidant à l'étranger

Au niveau de l'Agence de **Promotion des Investissements**, l'évolution depuis 1994 à 2008 montre que pour le nombre de projets déclarés, les TRE représentent 10% de l'ensemble des projets agrées par l'Agence mais seulement 0,2% des investissements et 2% des emplois.

Au niveau de l'agence de promotion des investissements agricoles APIA, là aussi la contribution des TRE est relativement marginale 1 à 3% pour les projets (100 et 118 en 2007 et 2008).

Concernant l'emploi, une centaine environ en moyenne depuis 1994. (146 en 2007 et 2008), là encore il ne s'agit que d'intentions. Aucun suivi n'est fait.

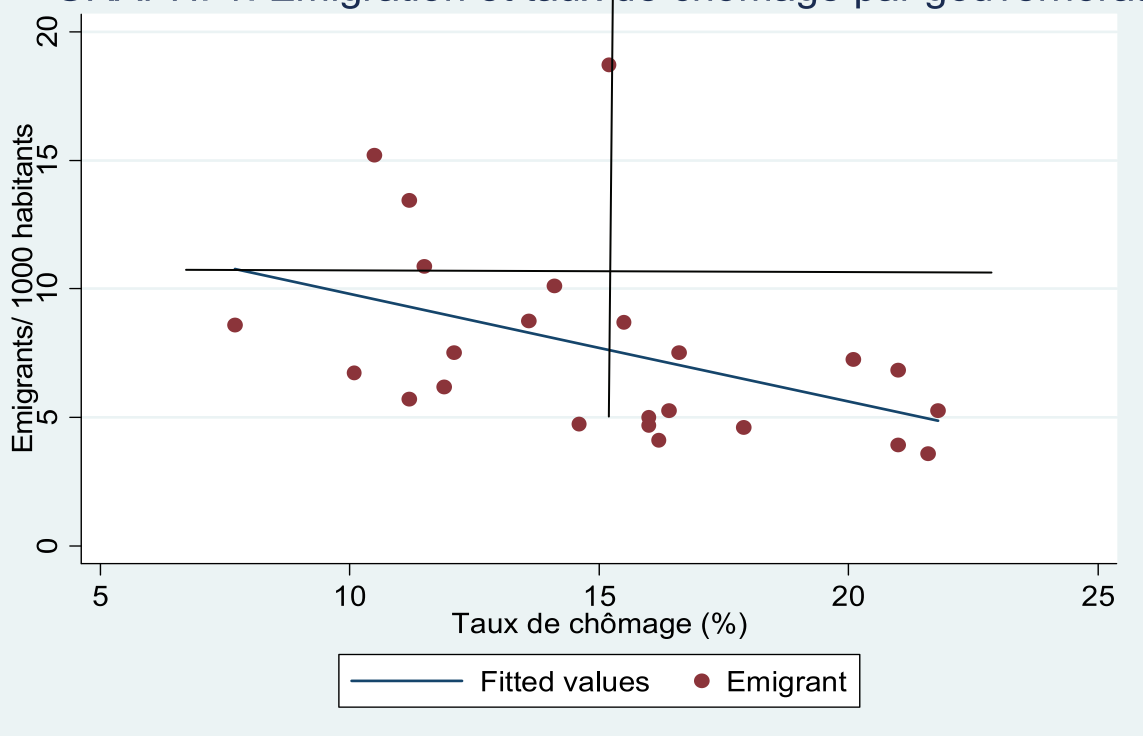
Globalement la contribution des projets des TRE à l'emploi est marginale. L'enquête exhaustive sur les projets agréés entre 1995-2001 réalisée par l'Office des Tunisiens à l'Etranger, montre que 35,5% des projets ont été réellement exécutés. L'étude fait également ressortir que de nombreux émigrés déclarent des projets auprès des institutions d'investissement dans l'unique but de pouvoir bénéficier de l'importation en franchise des droits de douanes prévue pour les véhicules utilitaires. En l'état actuel, l'effet en terme d'emplois créés semble plutôt marginal. De plus, aucun suivi n'est effectué. Ceci constitue une grande carence dommageable pour la Tunisie.

5.2.3. Impact de l'émigration sur le marché du travail

5.2.3.1. Au niveau des gouvernorats

Pour analyser l'impact de l'émigration sur certains paramètres du marché du travail: taux de chômage et taux d'activité [celui des femmes en particulier] et aussi le taux de scolarisation, nous avons d'abord élaboré un indicateur d'intensité de l'émigration par gouvernorats [subdivision administrative comparable aux préfectures en France], à savoir le nombre d'émigrés pour 1000 habitants [émigrants entre 1999 et 2004 rapportés à la population moyenne 1999-2004], et avons testé la corrélation entre émigration et taux de chômage, émigration et taux d'activité (ensemble des 2 sexes) et émigration et taux d'activité chez les femmes et émigration et taux de scolarité [6 – 14 ans].

GRAPH. 1. Emigration et taux de chômage par gouvernorat



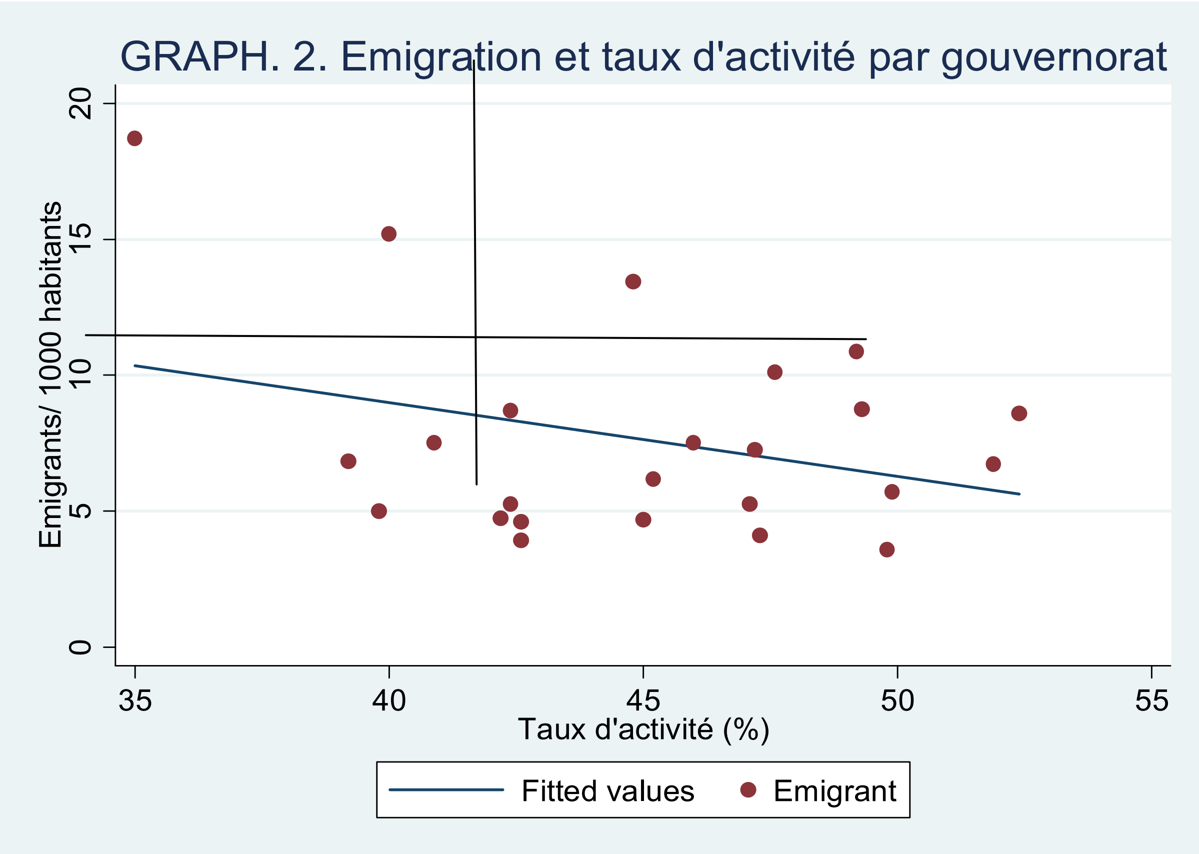
Emigrants/ 1000 hab. = -0.41 Taux de Chômage +13.97[♣]

♣ La constante est relativement élevée car les valeurs prises par la variable explicative (Taux de chômage) sont plus grandes que celles prises par la variable expliquée (Emigrants/1000).

(Significatif à 95% de degré de confiance)

Emigration et taux de chômage

Le premier graphique montre que le coefficient de corrélation est de -0.41 entre l'émigration et le taux de chômage (avec 95% de degré de confiance). La relation est négative, elle se vérifie dans 16 sur 24 cas soit 75% au moins. Ceci signifie qu'en règle générale, l'émigration est en relation plutôt inverse avec le taux de chômage, et que **vraisemblablement l'émigration amortie jusqu'à un certain point l'acuité du chômage par gouvernorat.**

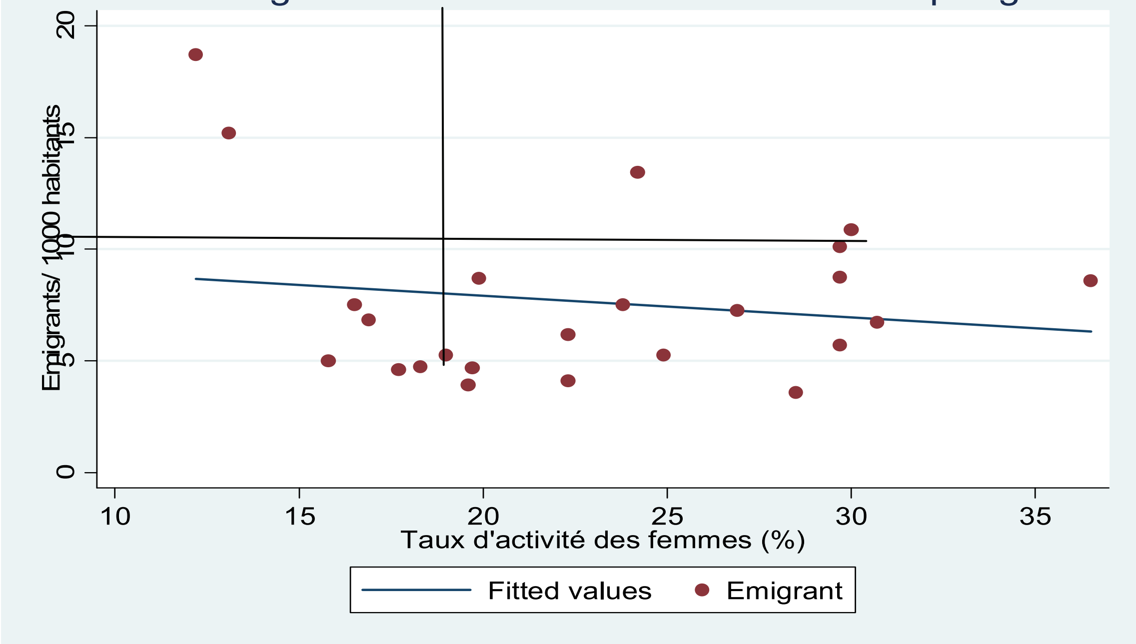


Emigrants/ 1000 hab. = -0.27 Taux d'activité + 19.89
(Non significatif)

Emigration et taux d'activité

Le deuxième graphique établit une corrélation entre l'émigration et le taux d'activité pour les 2 sexes. La corrélation est négative et peu significative. Le positionnement des gouvernorats est variable et éparpillé à travers les 4 cadrans [séparés par les valeurs médianes]. Le 3ème graphique concerne la corrélation entre l'émigration et le taux d'activité des femmes; Le coefficient est faible, négatif et non-significatif. On ne peut tirer de conclusion significative même si la pente de la droite est légèrement négative. A ce stade, **on ne peut conclure d'un effet significatif de l'émigration sur le taux d'activité en général.**

GRAPH. 3. Emigration et taux d'activité des femmes par gouvernorat

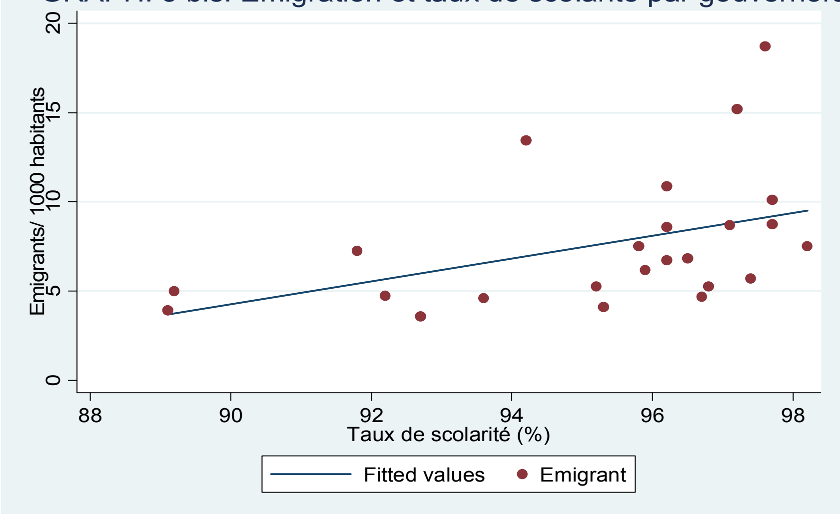


Emigrants/ 1000 hab. = -0.09 Taux d'activité + 9.86
(Non significatif)

Emigration et taux de scolarisation

La graphique 3 bis montre une bonne corrélation positive et significative (95% de degré de confiance) entre l'émigration et le taux de scolarité. A priori, l'émigration agirait positivement sur le taux de scolarisation.

GRAPH. 3 bis. Emigration et taux de scolarité par gouvernorat



Emigrants/ 1000 hab. = 0.64 Taux de scolarité - 53.42 (Significatif à 95% de degré de confiance)

5.2.3.2. Au niveau régional

Pour faciliter l'analyse et l'interprétation, on a regroupé, selon la nomenclature officielle, les gouvernorats en sept régions et étudié la corrélation entre l'émigration et le niveau de vie saisi à travers la dépense par personne et par an DPA, l'émigration et le taux de chômage, l'émigration et le taux d'activité, l'émigration et le secteur informel.

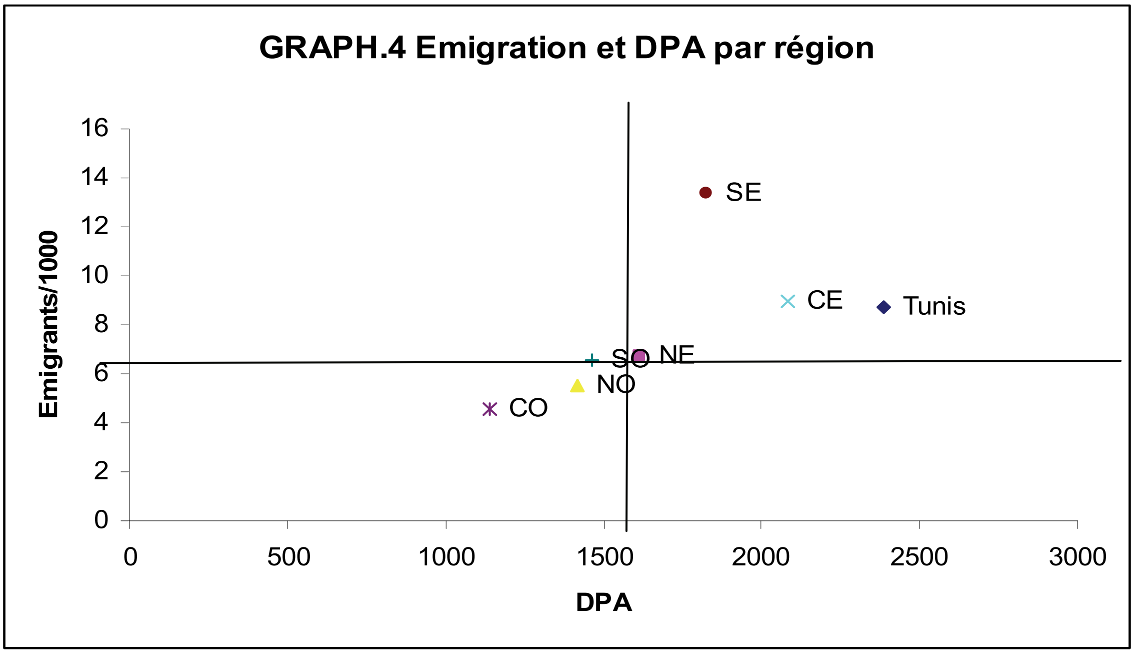
A- Emigration et DPA par région [TAB 33]

Tableau 33- Emigration par région (1999-2004)

Région	Emigrants/Région (1999-2004)	Emigrants/1000 habitants	Dépenses/personne/an (2005)
District de Tunis	18623	8,7	2390
Nord Est	8893	6,7	1613
Nord Ouest	6847	5,5	1416
Centre Est	19356	9,0	2084
Centre Ouest	6242	4,6	1138
Sud Est	12082	13,4	1826
Sud Ouest	3730	6,6	1466

Le graphique G4 qui positionne les 7 gouvernorats selon les 4 cadrans (séparés par les valeurs médianes) montre clairement que les 3 régions littorales: District de Tunis, Centre-Est et Sud-Est, affichent une intensité d'émigration forte associée à une DPA élevée. A l'inverse dans le Centre-Ouest et le Nord-Ouest [intérieur], la faible intensité de l'émigration est associée à une faible DPA. Le Nord-Est [littoral] est plutôt attiré vers le cadran supérieur alors que le Sud-Ouest [intérieur] vers le cadran inférieur en ayant tous les 2 un nombre d'émigrants par 1000 habitants similaires.

Globalement, l'émigration avantage les régions du littoral plus riches comparativement.



B- Emigration et taux de chômage [TAB 34]

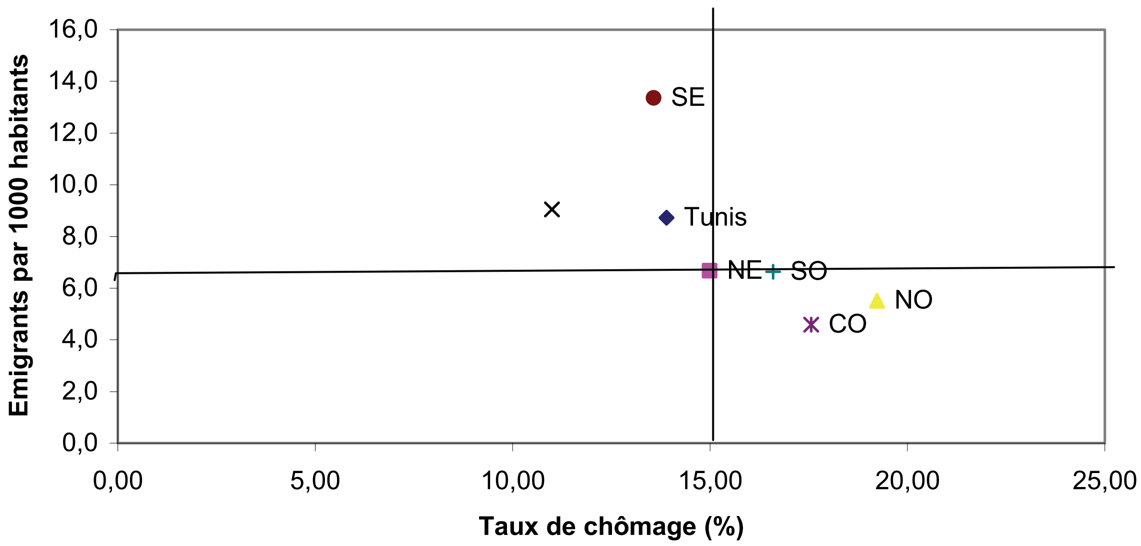
TAB 34. Emigration, taux de chômage et taux de scolarisation (2004)

Région	Taux d'activité (%) (2004)			Taux de chômage (2004)	Taux de scolarisation (%) (2004)
	E	M	F	E	E
District de Tunis	48,3	67,1	29	13,9%	0,975
Nord Est	49,4	70,6	27,8	15,0%	0,956
Nord Ouest	45,3	69,5	22,3	19,2%	0,937
Centre Est	47,5	67,9	27,3	11,0%	0,958
Centre Ouest	41,3	66,4	17,6	17,6%	0,9
Sud Est	40,2	66,6	15,5	13,6%	0,972
Sud Ouest	40,7	65,4	17,3	18,6%	0,97

Source: INS

Le graphique G5 confirme la même conclusion et montre encore une fois que les régions du littoral: District de Tunis, Centre-Est et Sud-Est, ont relativement le taux de chômage le moins élevé associé à une intensité d'émigration comparativement plus forte. A l'inverse du Centre-Ouest et du Nord-Ouest avec une faible émigration et un taux de chômage plus élevé. Le Nord-Est est tiré vers le cadran supérieur et le Sud-Ouest vers le cadran inférieur.

GRAPH. 5 Emigration et taux de chômage par région (2004)

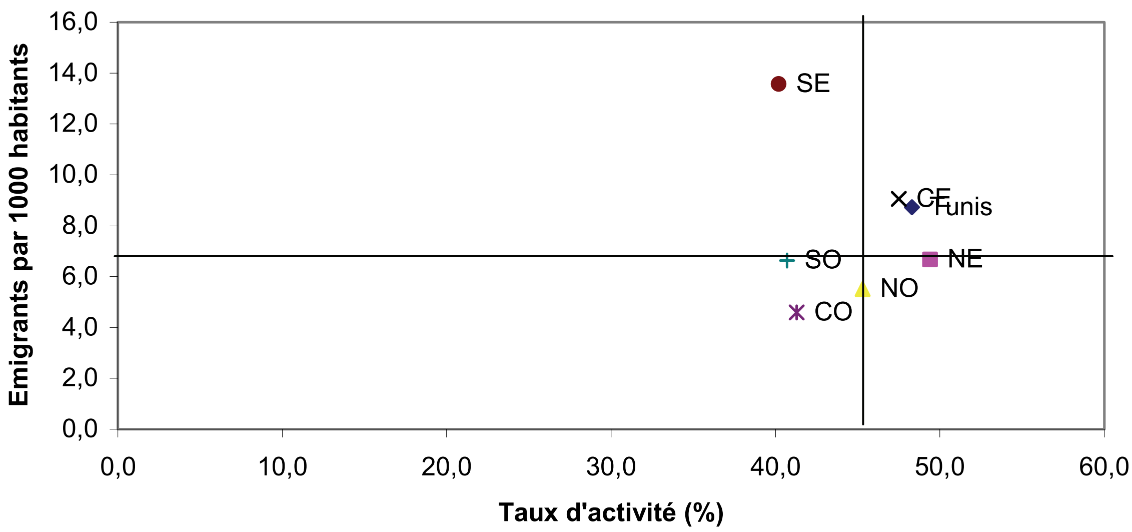


Aussi, une première conclusion mérite d'être tirée: Les régions du littoral associent en général et comparativement une émigration plus intense à une DPA plus élevée et un taux de chômage moins fort. A l'inverse des régions de l'intérieur avec une faible intensité d'émigration, une DPA moindre et un taux de chômage plus élevé.

La configuration des flux d'émigration entre 1999 et 2004 en fonction des régions d'origine ne contribue pas à réduire les disparités régionales en Tunisie. Toutefois, une étude plus fine pourrait montrer si les émigrés du littoral ne sont-ils pas de fait des émigrés de l'intérieur procédant en 2 étapes: émigration interne ensuite émigration internationale. Cela mériterait une investigation.

C- Emigration et taux d'activité (G 6)

GRAPH. 6 Emigration et taux d'activité par région (2004)



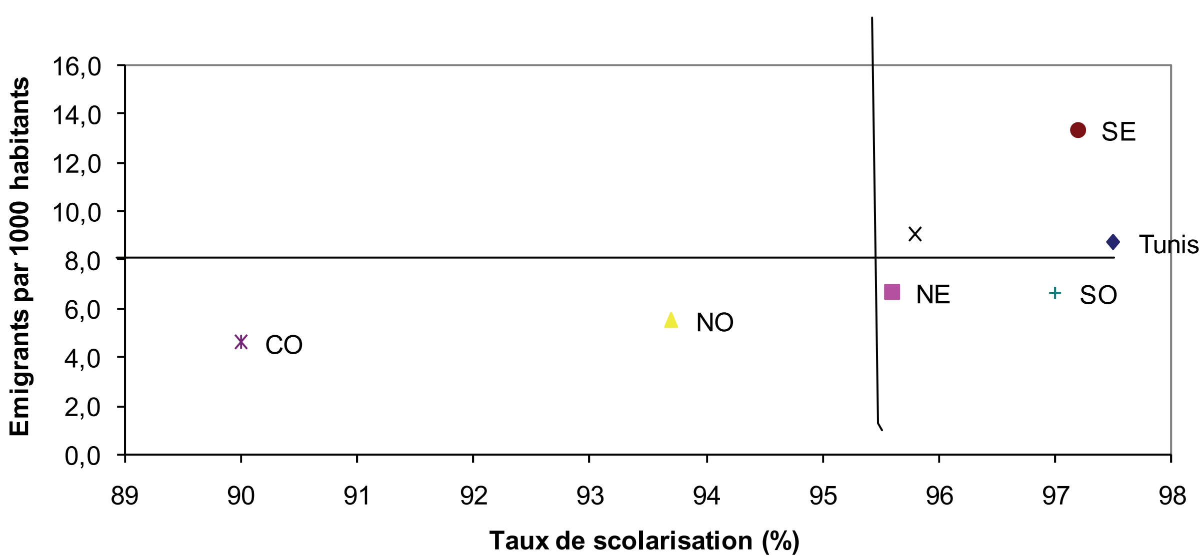
Le Sud – Est, le Sud – Ouest, le Centre – Ouest affichent des taux d'activité proches alors que le nombre d'émigrés par 1000 habitants est différent: élevé dans le Sud – Est, moyen dans le Sud – Ouest et faible dans le Centre – Ouest. Comme déjà établi au niveau des gouvernorats, la corrélation est donc plutôt faible et non significative.

Le cas le plus intéressent est celui du Sud-Est [limitrophe de la Libye et de transit par voie de mer pour l'émigration en Italie], les émigrés pour 1000 habitants représentent 13,4 [l'intensité la plus forte comparativement]. C'est là où les taux d'activité sont les plus faibles: 40,2% pour l'ensemble des 2 sexes et seulement 15,5% pour les femmes. Manifestement, dans cette région où la DPA en 2005 était de 1826 DT [3ème rang après le District de Tunis 2390 DT et le Centre Est 2084 DT].donc moyennement élevé, l'émigration est associée à des taux d'activité très faibles y compris pour les femmes. Cette posture du Sud–Est est singulière et mériterait une plus fine investigation.

D- Emigration et taux de scolarisation

Dans le graphique G7, on peut relever que dans le District de Tunis, le Sud-Est, et dans une moindre mesure le Centre-Est, là où l'émigration est comparativement plus élevée, les taux de scolarisation affichent les scores les plus forts. A l'inverse, le Centre-Ouest, le Nord-Ouest et dans une moindre mesure le Nord-Est à une émigration plus faible relativement est associé des taux de scolarisation plutôt bas en comparaison. Seul le Sud-Ouest présente une posture associant faible émigration et forte scolarisation. A vu du positionnement dans les 4 cadrans des 7 régions, **la corrélation entre émigration et scolarisation** est significative et positive pour le District de Tunis et le Sud – Est, négative pour le Centre – Ouest et dans une moindre mesure le Nord-Ouest. Pour les 3 autres régions, le pronostic est à nuancer. Ceci ne contredit l'existence d'une bonne corrélation positive déjà mise en évidence entre émigration et taux de scolarisation

GRAPH. 7 Emigration et taux de scolarisation par région (2004)



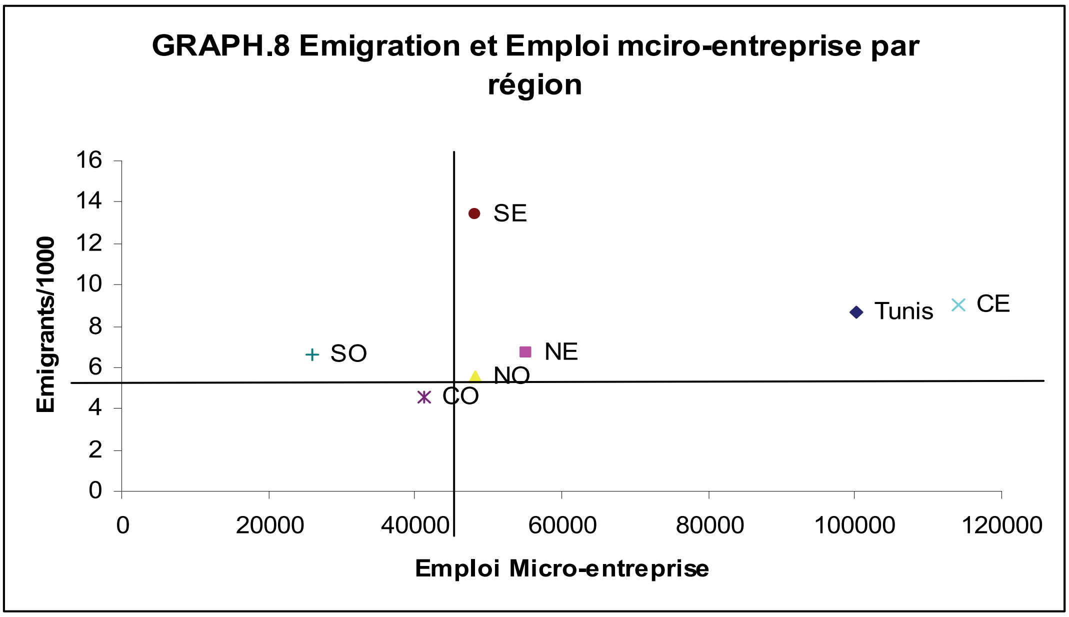
E- Emigration et secteur informel [TAB 35]

TAB 35 - Emploi dans les micro-entreprises (2002)

GOVERNORAT	Emploi micro-entreprise	Emploi micro-entreprise en % total
District de Tunis	100089	0,231133
Nord Est	55054	0,127135
Nord Ouest	48228	0,111372
Centre Est	114169	0,263647
Centre Ouest	41258	0,095276
Sud Est	48154	0,111201
Sud Ouest	26085	0,060237
TOTAL	**433037**	**100%**

Nous avons pris ici en considération le point de l'emploi des micro-entreprises[137] dans l'emploi total de chaque région. En mettant en relation l'émigration et la contribution des micro – entreprises (M.E) dans l'emploi total par région [G 8], on peut relever une certaine corrélation. Certes dans le District de Tunis, le Centre-Est et le Nord-Est se trouvent associés forte émigration comparativement et plus grande contribution des M.E [complémentarité]. La même corrélation est vérifiée en sens inverse pour le Centre-Ouest où le faible dynamisme des M.E est associé à la faible intensité de l'émigration. Pour le reste, il y a lieu de souligner que le sud-Ouest qui a la même propension à l'émigration que le Nord-Est affiche une très faible contribution des M.E à l'emploi. Il en est de même quand on compare le Sud-Est au Nord-Ouest; pour contribution plus ou proche des M.E à l'emploi sont associées des intensités d'émigration fortement contrastées.

Ainsi, **sur la liaison entre émigration et informalité de l'emploi, le pronostic est plutôt réservé dans l'attente d'une investigation plus fine.**



137 Comme précisé dans le secteur 3.2, les micro - entreprises en 2002 représentaient 57,4% de l'emploi informel. La totalité de l'emploi informel égale 34,3% de l'emploi total.

En conclusion, les impacts de l'émigration sont plus probables sur la DPA, le taux de chômage et sur le taux de scolarisation mais non sur le taux d'activité et plutôt incertains sur le secteur informel.

La contribution des tunisiens à l'étranger en terme de transfert est relativement appréciable, toutefois, leur contribution en termes de projets et de création d'emplois [à l'occasion des retours saisonniers ou définitifs] ne semble pas être significative d'autant que peu ou pas de suivi n'est effectué.

5.3. Pour une politique migratoire proactive en Tunisie

L'argumentaire

La Tunisie doit rompre avec le « laisser faire » ou la politique « subie » ou d'adaptation aux politiques migratoires des partenaires et avoir une **politique PROACTIVE** de la migration.

En Tunisie, l'émigration contrôlée est relativement faible et en deçà du potentiel.

- Alors que le solde migratoire de 1990 à 2000 était positif, il devient depuis 2000 négatif signe d'une reprise manifeste de l'émigration avec une forte accélération en 2005 – 2006 et 2007.
- L'émigration d'emploi contrôlé par l'ANETI et l'ATCT: 3000 en moyenne depuis 2002 est faible.
- L'émigration familiale un peu plus de 2000 en moyenne par an depuis 2002.
- L'émigration totale contrôlée [d'emploi + familiale] est d'un peu plus de 5000 en moyenne par an. Le solde migratoire indique des moyennes négatives de 15000 aux coirs des dernières années.
- Le reliquat soit une dizaine de milliers représentent le potentiel de l'émigration non contrôlée.
- Les tensions encore persistantes au moins dans le moyen terme sur le marché du travail militent pour initier une politique migratoire d'emploi en tant que composante à part entière de la politique de l'emploi.

Les faiblesses actuelles

- Le fait migratoire est géré par plusieurs institutions publiques [et récemment privées non contrôlées] le Ministère de l'Emploi (pour les étrangers en Tunisie), l'ANETI pour les placements surtout en Europe [France et Italie dans le cadre des accords bilatéraux], l'ATCT surtout en direction du Golfe et récemment l'Amérique du Nord et de l'Afrique, l'Office des Tunisiens à l'Etranger OTE dont la mission est l'encadrement et l'assistance aux tunisiens résidants à l'étranger, l'API et l'APIA pour les projets d'investissements des émigrants lors de retours saisonniers ou définitifs (sans suivi); enfin le Ministère des Affaires Etrangères (affaires consulaires) qui grâce à ses réseaux de consulats et chancelleries « quadrille » la présence tunisienne à l'étranger.
- **La problématique migratoire accuse un manque manifeste, de cohérence et d'efficacité et ce en raison de la multiplicité des acteurs et du manque de coordination en l'absence d'une politique d'ensemble explicite.**
- Ces divers organismes en charge de la migration fournissent des données statistiques. De plus l'INS à travers les Recensements Généraux [2004 en particulier] et les Enquêtes annuelles sur la population et l'emploi depuis 2005, produit une Composante Migratoire très riche, cependant non diffusée et disséminée auprès des acteurs publics de la migration.

  Enfin, la Banque Centrale de Tunisie (BCT) établit, par ailleurs, régulièrement les données sur les transferts des tunisiens résidants à l'étranger.

  Le système d'information statistique sur les migrations souffre à la fois d'un manque de coordination, de centralisation, de standardisation et de diffusion.

Les contours d'une politique migratoire

Une politique migratoire ou une politique de gestion de la mobilité internationale du travail est **un tout:**

- à deux facettes:
  - l'immigration [des étrangers en Tunisie, temporaire, transit, permanente, …]

- l'émigration [des tunisiens à l'étranger]
- à plusieurs dimensions liées:
    - Migration et emploi
    - Migration et développement
    - Migration, famille et insertion
    - Migration et sécurité
    - Migration et protection juridique humaine et sociale

L'approche doit etre globale multi-institutionnelle. Elle nécessite la mise en cohérence et synergie de l'ensemble des institutions en charge du fait migratoire par la mise en place d'une Structure Unifiée gérant l'ensemble du processus migratoire: Un Secrétariat d'Etat à la promotion des tunisiens à l'étranger par exemple. De plus, et à la base de toute politique migratoire globale et intégrée, il faut se doter d'une base de données informatisées regroupant et harmonisant l'ensemble des informations statistiques (et autres), couvrant tout le champ migratoire, jusqu'alors éparpillées et non disséminées et donc non utilisées à des fins opérationnelles.

La Tunisie doit se doter d'une capacité institutionnelle appropriée et d'une connaissance de base statistique solide préalable à la formulation d'une politique migratoire globale, cohérente et efficace [la coopération avec l'UE est nécessaire]. Cette politique devrait intégrer et le concept de mobilité internationale du travail et celui de migration circulaire permettant d'organiser de concert avec les partenaires des séjours avec possibilité de retours [avec préservation des droits acquis].

Si le principe d'une politique migratoire proactive est admis, sa formulation nécessite une étude stratégique exploratoire avec l'appui d'une expertise européenne couvrant tout le champ migratoire et débouchant sur l'énoncé des objectifs, des réformes à entreprendre, des structures institutionnelles à mettre en place et des axes de coopération avec les partenaires qui supposent l'identification du potentiel migratoire [déficits – excédents] à moyen – long terme.

Annexes

Annexe 1- Concepts et définitions

1. **Les concepts adoptés avant l'année 2004:**
   A. Population active occupée: Elle comprend les personnes actives qui ont travaillé au moins une journée au cours de la semaine de référence précédant le jour de l'enquête. Les journées non travaillés pour cause de congé, de maladie et d'intempéries sont considérées comme des journées travaillées.
   B. Population en chômage: Ce sont les personnes actives âgées de 18 à 59 ans qui n'ont pas travaillé au cours de la semaine de référence (pour autre cause que congé, maladie ou intempéries) et se déclarent à la recherche d'un emploi et disponibles pour travailler.

2. **Les concepts adoptés à partir de l'année 2004:**
   A. Population active occupée: La population occupée est constituée des individus de deux sexes âgés de 15ans et plus et qui ont travaillé au moins un jour, ne serait-ce qu'une heure, durant les sept jours qui précèdent la date de l'enquête, des militaires du contingent (sous les drapeaux) et des personnes qui n'ont pas travaillé au cours de la semaine pour des raisons de congé de repos ou de maladie ou d'intempéries notamment pour les personnes s'adonnant à des activités agricoles ou pour des raisons d'arrêt momentané notamment pour les personnes s'adonnant à des activités agricoles ou pour des raisons d'arrêt momentané du travail.
   B. Population en chômage: Ce sont les personnes actives âgées de 15 ans et qui:

   -n'ont pas travaillé ne serait ce qu'une heure pendant la période de référence (semaine précédant le jour de l'enquête);

   -se déclarent à la recherche effective d'un emploi;

   -sont disponibles pour travailler.

5. **Population d'âge actif**
   La population d'âge actif est constituée des personnes âgées de 15 ans et plus.

6. **Population active totale**
   Elle est obtenue par sommation de la population occupée d'une part et la population non-occupée d'autre part.

7. **Taux d'activité**
   C'est le rapport du nombre de personnes actives (15 ans et plus).

8. **Taux d'activité par groupe d'âge**
   C'est le rapport du nombre de personnes actives, dans un groupe d'âge donné, à l'ensemble de personnes de ce même groupe d'âge, (nombre d'actifs d'un groupe d'âge donné pour 100 personnes de ce même groupe d'âge).

9. **Taux de chômage**
   C'est le rapport du nombre de chômeurs au nombre d'actifs de même groupe d'âge (nombre de chômeurs pour 100 actifs).

10. Taux de chômage par groupe d'âge

C'est le rapport du nombre de chômeurs au nombre d'actifs de même groupe d'âge (c'est le nombre de chômeurs pour 100 actifs dans un groupe d'âge donné).

11. Secteurs d'activités

Les actifs occupés sont classés dans les secteurs d'activités des entreprises auxquelles ils appartiennent.
Les secteurs d'activité sont classés selon la nomenclature d'activité tunisienne (NAT).

12. Statut dans la profession

Cinq statuts dans la profession sont distingués:

- Patron: personne qui exerce pour son propre compte et qui emploie un ou plusieurs salariés (en dehors des aides familiaux).
- Indépendant: personne qui exerce pour son propre compte, seule ou avec des aides familiaux.
- Salarié: personne qui exerce un travail rémunéré pour le compte d'un patron, de l'administration ou d'une société.
- Aide familiale: personne qui contribue dans l'activité d'une entreprise familiale sans rémunération en tant que salariée.
- Apprenti: personne qui est encore au stade d'apprentissage d'un métier.

13. Offre d'emploi enregistrée à l'ANETI

Toute déclaration d'embauche exprimée par l'entreprise auprès de l'ANETI.

14. Les demandeurs d'emploi nouvellement inscrits

Ce sont les personnes qui s'inscrivent pour la première fois dans un bureau d'emploi comme demandeurs d'emploi.

15. Le Fonds National de l'Emploi 21-21 (FNE)

Le Fonds National de l'Emploi (FNE) « 21-21 », depuis sa création en 200, intervient sur deux mécanismes essentiels: l'employabilité et la création d'entreprise.

A. Amélioration de l'employabilité:

Cet axe inclut de nombreux programmes:

- Formation –reconversion dans les spécialités demandées par le marché de l'emploi;
- Programme d'apprentissage au près des entreprises et des artisans;
- Formation-emploi dans le cadre de travaux d'intérêt public;
- D'aide à l'insertion.

B. Encouragement à la création d'entreprises et stimulation de l'esprit d'initiative:

Cet axe inclut la création de projets, la construction de cités de métiers et la réalisation d'espaces industriels.

16. Stages d'Initiation à la Vie Professionnelle (SIVPI)
Ces stages sont destinés aux jeunes diplômés de l'enseignement supérieur ou ayant accompli avec succès le premier cycle de cet enseignement.

17. Stages d'Initiation à la Vie Professionnelle (SIVP2)
Ces stages sont destinés aux jeunes ayant accompli la 9ème année de l'enseignement de base, au minimum (3ème année de l'enseignement secondaire, ancien régime) ou ayant le niveau du premier cycle de l'enseignement supérieur.

18. Contrat Emploi-Formation (CEF)
Le contrat Emploi-Formation « CEF » cible:

- Les jeunes ayant au moins le niveau de la 9ème année de l'enseignement de base accomplie (troisième année de l'enseignement secondaire, ancien régime) et titulaire d'un diplôme ou d'un certificat de fin de formation délivré par un établissement de formation professionnelle public ou privé;
- Les jeunes ayant un niveau scolaire compris entre la 9ème année de base et la 4ème de l'enseignement secondaire;
- Et les jeunes sortants d'un centre de formation professionnelle agricole.

19. Le FIAP
Le « FIAP » a pour objectif de favoriser l'insertion des demandeurs d'emploi dans la vie active à travers leur adaptation à des postes d'emploi prédéfinis recommandés par des employeurs.

20. Les Stages d'Initiation et d'Adaptation à la Création d'Entreprise (SIACE)
Le « SIACE » a pour objectif d'acquérir des compétences pratiques, opérationnelles et professionnelles nécessaire pour la gestion des entreprises, ainsi il permet aussi de développer l'esprit entrepreneurial chez les jeunes désirant s'installer à leur propre compte.

21. La Banque Tunisienne de Solidarité (BTS)
Crée en 1977, la Banque Tunisienne de Solidarité (BTS) a pour de faciliter davantage l'accès aux crédits bancaires pour les micro-entrepreneurs. Elle a été chargée, à partir de janvier 2003 de gérer les programmes de prêts et de microcrédits conçus par le Fonds 21-21 et les autorités régionales.

22. Le Fonds National de Promotion de l'Artisanat et des Petits Métiers (FONAPRA)
Le fonds National de Promotion de l'Artisanat et de Petits Métier (FONAPRA) permet à des personnes désirant s'installer à leur propre compte de bénéficier de conditions de financement avantageuses dans le secteur de l'artisanat et des petits métiers à l'exclusion des activités à caractère commercial.

23. Prise en charge par l'Etat d'une part des salaires versés au titre des nouveaux recrutements des diplômés de l'enseignement supérieur
Ce programme a pour objectif l'encouragement des entreprises privées à recruter les diplômés de l'enseignement supérieur;

- Les entreprises qui effectuent la première opération de recrutement d'un ou plusieurs diplômés de l'enseignement supérieur;
- Les petites et moyennes entreprises qui adhèrent nouvellement au programme de mise

à niveau (à partir du 1er janvier 2004);

- Les petites et moyennes entreprises installées dans les zones de développement régional.

24. Prise en charge par l'Etat de la contribution patronale

Prise en charge par l'Etat de la contribution patronale au régime légal de la sécurité sociale pour les salaires versés au titre des nouveaux recrutements de diplômés de l'enseignement supérieur durant une période de cinq ans. (A partir de 2005 la prise en charge par l'Etat s'étale sur une période de sept ans et ce, d'une manière dégressive).

Annexe 2- Les Sources statistiques nationales

- L'Institut National des Statistiques – INS (cf. www.ins.nat.tn) est en première ligne pour la production et surtout le traitement et la diffusion des données statistiques en général et des données migratoires.

  L'INS intervient dans la production des statistiques migratoires de deux manières: principalement à travers les Recensements Généraux de la Population et de l'Habitat (RGPG) et à travers l'enquête annuelle sur la population et l'emploi depuis 2003.

  Toutefois, la composante migratoire n'est pas diffusée.

- L'Observatoire National de l'Emploi et des Qualifications dépendant du Ministère de l'Emploi et de l'Insertion Professionnelle des Jeunes.

  L'Observatoire a une publication annuelle: « Statistiques de l'Emploi ». Ce document vise à présenter un outil de travail pour les différents utilisateurs qui cherchent à mieux connaître et analyser le fonctionnement du marché de l'emploi, fournit une synthèse sur plusieurs années des principaux indicateurs de ce marché calculés à partir de diverses sources. Il couvre plusieurs domaines:

  Le domaine « activité, emploi et chômage » qui s'appui sur les résultats des recensements et des enquêtes réalisés par l'INS et présente des informations sur la population active, la population active occupée et la population en chômage.

  Le domaine « marché de l'emploi couvert par l'ANETI » présente des informations sur les offres et les demandes d'emploi, ainsi que les placements en emploi enregistrés au niveau des bureaux d'emploi.

  Le domaine « Programmes d'encouragement à l'emploi » renseigne sur l'évolution des réalisations relatives aux programmes d'encouragement à l'emploi (bénéficiaires, financements, etc.).

  Les données sont fiables.

- Les données consulaires sont du ressort du Ministère des Affaires Etrangères (MAE).

  Le MAE dispose d'un réseau bien étoffé de consultas et de chancelleries dans les principaux pays d'immigration. La présence tunisienne y est densément quadrillée.

  Ses bases de données constituent la principale source d'information sur l'émigration à l'étranger. Ces données sont systématiquement citées et utilisées par les administrations et les organismes publics. Elles ont une fiabilité moyenne.

- Le Ministère de l'Emploi et de l'Insertion Professionnelle des Jeunes, à travers la Direction Générale de l'immigration et de la Main d'œuvre Etrangères fournit les statistiques sur les étrangers travaillant en Tunisie.

  Ce Ministère est par ailleurs doté d'une Agence Nationale pour l'Emploi et le Travail Indépendant (NATI), dont la mission est de mettre en relation la demande d'emploi émanant de la Tunisie, et l'offre d'emploi émanant de la Tunisie ou de l'étranger.

  Elle fournit en particulier des données fiables sur les placements de tunisiens à l'étranger en Europe en particulier.

- Le Ministère du Développement et de la Coopération Internationale à travers l'Agence tunisienne de la Coopération Technique ATCT fournit les données des placements de cadres tunisiens orientés vers les pays du Golfe surtout.

- La Banque Centrale de Tunisie produit régulièrement des données plus ou moins détaillées sur le poste: Revenus du travail correspondants aux transferts des tunisiens à l'étranger.

- Enfin, l'Agence de Promotion des Investissements (API) et l'Agence de Promotion des Investissements Agricoles (APIA) fournissent des données plus ou moins détaillées sur les projets des tunisiens résidents à l'étranger… Mais sans aucun suivi.

En général, les données statistiques en Tunisie sont nombreuses et fiables. Le problème est plutôt dans l'éparpillement et la non-diffusion systématique.

Annexe 3- Les principaux documents utilisés

1. CARIM [E.U.I – RSCAS]; 2005, 2006, 2007 Reports
2. Commission de la Consultation Nationale sur l'Emploi
   - Evaluation des instruments de la politique active de l'emploi orientés vers les diplômés de l'enseignement supérieur (2008)
   - L'emploi, un défis aux dimensions multiples
3. Institut National des Statistiques
   - Projection de la population 2004 – 2034
   - Projection de la population active 2001 – 2034
   - Enquête sur les micros entreprises en 2002 [N° 2]
4. Ministère du Développement de la Coopération Internationale: Le 11ème Plan de développement.