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Moroccan migration trends and development potentials



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**Moroccan migration trends
and development potentials**

Author: Hein de Haas, October 2016



Executive summary

This study analyses the recent evolution of migration to and from Morocco and its potential to contribute to development. It highlights how Morocco has evolved into a prominent emigration country since the 1960s. The Moroccan diaspora in Europe consists of more than 3 million people, while smaller migrant communities live elsewhere. The global economic crisis (GEC) of 2008 led to a slowdown in emigration but relatively few migrants returned permanently. As was the case with the restrictions put in place by north-western European destination countries after the 1973 oil crisis, the introduction of visas by Spain and Italy in 1990-1 interrupted circulation and stimulated the settlement of Moroccan workers, which in turn was followed by large-scale family migration.

Although primarily remaining an emigration country, since 2000 Morocco has experienced increasing immigration of migrants and refugees from sub-Saharan countries as well as Syria. While some see Morocco primarily as a 'transit country', increasing numbers of skilled sub-Saharan Africans, as well as Europeans, migrate to Morocco to work, study or set up businesses. The growing presence of immigrants has prompted a rethink of Moroccan immigration policies, including a recent legalisation campaign. Although it is uncertain whether these trends are a harbinger of Morocco's future transition to a net immigration country, under positive scenarios of political stability and equitable economic growth, future emigration may decrease and immigration increase.

Parallel to continued emigration, remittances soared to about US\$7 billion in recent years, equal to approx. six to seven per cent of Morocco's GDP, and about six times the amount of official development assistance. Remittances contribute significantly to family income, poverty reduction and school enrolment in origin areas. However, it is important not to exaggerate the development potential of migration. Despite its considerable benefits for families and communities, migrants alone cannot remove structural migration and development constraints. The latter mainly consist of (i) immigration restrictions which interrupt circular migration and limit the access of relatively poor people to migration opportunities, and (ii) rather unfavourable investment conditions in Morocco, particularly in the form of government bureaucracy, problems with

the recognition of foreign degrees, corruption and the lack of legal security, especially with regard to ownership of land, real estate and other assets.

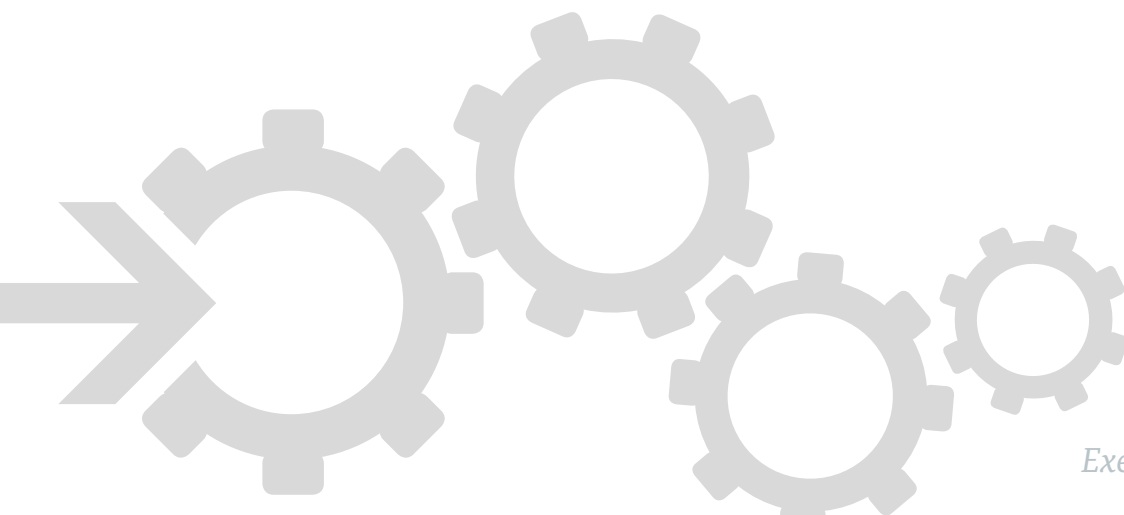
To understand the widely diverging experiences of return migrants and to support them more effectively, this study makes a distinction between four categories of returnees: (1) *Involuntary return migrants*: formerly undocumented migrants who were deported back to Morocco and who often suffer from significant psychosocial problems and marginalisation; (2) *Low-skilled voluntary return migrants*: mainly consisting of recent returnees, particularly those whose return was technically voluntary but rather reluctant; these are primarily returnees from Italy and Spain following the GEC; (3) *High-skilled voluntary return migrants*: Moroccans who studied and/or worked abroad before returning, often setting out with the explicit intention of returning to settle back and/or invest in Morocco; and (4) *second-generation 'quasi-returnees'*: economically successful children of former 'guest-workers wishing to invest. Sub-Saharan African migrants and refugees living in Morocco actively contribute to economic growth through work and informal or formal entrepreneurship. Many employers prefer to employ sub-Saharan migrants because of their high motivation to work as well as language and other skills. This contrasts with the perception that they are a drain on Moroccan society. Nevertheless, their lack of rights, frequent exploitation and experiences with racism and discrimination provide obstacles towards their integration in, and economic contribution to, Moroccan society.

Policy approaches need to be adapted to the needs and socio-economic situation of these different migrant groups. The following policy recommendations can be formulated to minimise the risk of marginalisation of return migrants and immigrants in Morocco and to facilitate their socio-economic integration:

- **Support for business development by returnees and immigrants should be concentrated on those who are intrinsically motivated and capable of setting up small and medium-sized enterprises.** Assistance, guidance and training in setting up their businesses, and possible support in buying some equipment (in the case of poor returnees and immigrants), can generate positive results.



- Because of the focus of governments and NGOs on maximising the numbers of return migrants assisted, resources are often spread too thinly, which reduces the effectiveness of programmes. *It therefore seems wise to provide greater financial support and guidance to a smaller number of highly motivated return migrants.*
- Sub-Saharan immigrants and return migrants (particularly second-generation ‘quasi-returnees’) who wish to work but lack the qualifications, or whose foreign qualifications are not recognised, could benefit from easier access to work permits and from *financial support for certified vocational training and language and integration courses* in Morocco, as this would enable them to enter the formal labour market.
- *Legal changes and better implementation of existing rules is required in order to protect social and labour rights of immigrants in Morocco* and to give them and their children access to public education and health care, so as to facilitate social and economic integration in Moroccan society.
- *It is wishful thinking to associate forced and ‘reluctant voluntary’ return with economic development.* It is generally unrealistic to expect socially and economically marginalised return migrants to make any significant contribution to ‘development’ in Morocco. From these returnees’ perspective, it was their migration that represented opportunities for personal advancement and development. In fact, many of them wish to re-migrate. Their forced or ‘reluctant voluntary’ return often increases their feeling of marginalisation.
- Instead of expecting them to become entrepreneurs, *assistance to forced and ‘reluctant voluntary’ return migrants should therefore focus on psychosocial support to alleviate their situation of distress and suffering.* They are generally aware that their return is seen as a failure, and it is therefore inconceivable that this category can be forced to re-integrate. Moreover, they are generally reluctant to do so. This particularly applies to those suffering from psychosocial problems and those who do not feel accepted back home, have no family resources and are not motivated to invest.
- In general, *more attention should be given to supporting vulnerable and marginalised returnees as well as refugees and immigrants in Morocco.* The Government of Morocco and those of European countries have focused one-sidedly on supporting economic investment and on the success stories of high-performing and skilled returnees. However, they are much less in need of support than the forgotten category of failed and marginalised return migrants.



Zusammenfassung

Die vorliegende Studie untersucht die aktuellen Veränderungen der Migration von und nach Marokko und zeigt, inwiefern diese zur Entwicklung des Landes beitragen können. Marokko hat sich seit den 1960er Jahren zunehmend zu einem Auswanderungsland entwickelt. Die marokkanische Diaspora in Europa umfasst heute mehr als drei Millionen Menschen. Kleinere Gruppen marokkanischer Migrant/innen leben in anderen Regionen der Welt. Die globale Finanzkrise von 2008 hat zu einem Rückgang der Auswanderung geführt, doch kehren nur wenige Marokkaner/innen dauerhaft in ihr Herkunftsland zurück. Die von Spanien und Italien 1990/1991 eingeführte Visumpflicht wirkte sich auf zirkuläre Migration ähnlich aus wie die Zuwanderungsbegrenzung der nord- und westeuropäischen Länder nach der Ölkrise 1973: Viele marokkanische Arbeitsmigrant/innen ließen sich daraufhin dauerhaft in den beiden Ländern nieder und holten anschließend ihre Familien nach.

Obwohl Marokko weiterhin primär ein Auswanderungsland ist, steigt seit 2000 die Zahl der Migrant/innen und Flüchtlinge aus Ländern südlich der Sahara und aus Syrien. Während einige von ihnen Marokko als ein Transitland betrachten, immigrieren mehr und mehr hochqualifizierte Menschen aus Subsahara-Afrika und auch Europa nach Marokko, um dort zu studieren, zu arbeiten oder Unternehmen zu gründen. Die wachsende Zahl der Zuwanderer hat zu einem Umdenken in der marokkanischen Einwanderungspolitik geführt, einschließlich einer kürzlich veranlassten Legalisierung irregulärer Einwanderer. Noch ist unklar, ob dieser Trend der Vorbote für Marokkos Entwicklung hin zu einem Einwanderungsland ist. Jedoch könnten dauerhafte politische Stabilität und ein kontinuierliches Wirtschaftswachstum dazu führen, dass immer weniger Menschen auswandern und die Einwanderung zunimmt.

Parallel zur anhaltenden Emigration stiegen die Geldsendungen von Migrant/innen aus dem Ausland nach Marokko auf rund 7 Milliarden US-Dollar im Jahr 2010 – in etwa sechs bis sieben Prozent des marokkanischen Bruttoinlandsproduktes und das Sechsfache der öffentlichen Entwicklungsgelder. Die Geldsendungen von Migrant/innen tragen in den Herkunftsregionen erheblich zur Verbesserung des Familieneinkommens und der Schulbesuchsquote sowie zur Armutslinderung bei. Jedoch sollte das Entwicklungspotenzial von Migration

nicht überbewertet werden: Trotz der vielen Vorteile für Familien und Gemeinden kann Migration allein keine strukturellen Migrations- und Entwicklungshemmnisse beseitigen. Zu diesen Hemmnissen zählen vor allem (i) Einwanderungsbeschränkungen, die zirkuläre Migration behindern und ärmeren Menschen die Möglichkeit der Migration versperren. Darüber hinaus sind die (ii) Rahmenbedingungen für Investitionen in Marokko ungünstig: Hürden sind insbesondere die staatliche Bürokratie, Probleme bei der Anerkennung ausländischer Abschlüsse, Korruption und mangelnde Rechtssicherheit, vor allem in Bezug auf Grundstückseigentum, Immobilien und andere Vermögenswerte.

Um die sehr unterschiedlichen Erfahrungen rückkehrender Migrant/innen zu verstehen und um diese besser unterstützen zu können, unterscheidet die vorliegende Studie vier Kategorien von Rückkehrer/innen: (1) *Unfreiwillige Rückkehrer/innen*: vormals irreguläre Migrant/innen, die abgeschoben wurden und oft unter erheblichen psychosozialen Problemen und Marginalisierung leiden, (2) *geringqualifizierte freiwillige Rückkehrer/innen*: meist Migrant/innen, die erst kürzlich zurückgekehrt sind – zwar auf formal freiwilliger Basis, aber eher widerwillig. In erster Linie sind dies Marokkaner/innen, die im Zuge der Finanzkrise aus Spanien und Italien zurückkamen. (3) *Hochqualifizierte freiwillige Rückkehrer/innen*: Marokkaner/innen, die vor ihrer Rückkehr im Ausland studierten und/oder arbeiteten und sich dauerhaft in Marokko niederlassen wollen oder dort investieren möchten. (4) *„Quasi-Rückkehrer/innen“ der zweiten Generation*: wirtschaftlich erfolgreiche Kinder von Gastarbeiter/innen mit dem Wunsch, in Marokko zu investieren. Migrant/innen und Flüchtlinge aus Ländern südlich der Sahara tragen durch ihre Arbeit und ihr informelles sowie formelles Unternehmertum zu Marokkos Wirtschaftswachstum bei. Viele Arbeitgeber/innen bevorzugen Arbeitnehmer/innen aus diesen Ländern aufgrund ihrer hohen Arbeitsmotivation, aber auch ihrer sprachlichen und anderen Fähigkeiten. Dies steht in Kontrast zu der Wahrnehmung, dass sie bloße Nutznießer der marokkanischen Gesellschaft seien. Dennoch behindern fehlende Rechte, weitverbreitete Ausbeutung, Rassismus und Diskriminierung die Integration der Migrant/innen. Dies wirkt sich negativ auf ihren wirtschaftlichen Beitrag zur marokkanischen Gesellschaft aus.

Politische Lösungsansätze müssen die Bedürfnisse und sozioökonomischen Situationen der unterschiedlichen Migrant/innengruppen berücksichtigen. Folgende Empfehlungen für politische Maßnahmen können formuliert werden, um das Risiko der Marginalisierung von Rückkehrmigrant/innen und Einwanderern in Marokko zu minimieren und ihre sozioökonomische Integration zu fördern:

- **Die Unterstützung von Unternehmensgründungen von Rückkehrer/innen und Immigrant/innen sollte sich auf diejenigen konzentrieren, die ausreichend motiviert und imstande sind, kleine und mittelständige Unternehmen aufzubauen.** Positive Ergebnisse können durch Begleitung, Beratung und Trainings zu Unternehmensgründungen und gegebenenfalls durch die Unterstützung beim Erwerb von Ausstattung (insbesondere für mittellose Rückkehrer/innen und Einwanderer) erzielt werden.
- Da Regierungen und Nichtregierungsorganisationen primär an der Maximierung der Anzahl Rückkehrer/innen, die durch sie unterstützt werden, interessiert sind, sind die eingesetzten Mittel meist zu gering. Dies mindert die Effektivität von Rückkehrprogrammen. *Es scheint daher angebracht, eine kleinere Anzahl hochmotivierter Rückkehrmigrant/innen gezielt finanziell zu unterstützen und zu beraten, anstatt großangelegte Rückkehrprogramme zu entwickeln.*
- Durch einen besseren Zugang zu Arbeitserlaubnissen und durch *finanzielle Unterstützung bei der Ausbildung sowie Sprach- und Integrationskurse* kann die Integration in den marokkanischen Arbeitsmarkt erleichtert werden. Dies gilt insbesondere für Immigrant/innen aus Subsahara-Afrika und Rückkehrmigrant/innen (insbesondere „Quasi-Rückkehrer“ der zweiten Generation), die einer Arbeit nachgehen wollen, aber keine adäquate Qualifikation besitzen beziehungsweise deren im Ausland erworbene Qualifikation nicht anerkannt ist.
- *Gesetzesänderungen und eine bessere Umsetzung bestehender Regelungen sind notwendig, um soziale Rechte und Arbeitsrechte von Immigrant/innen in Marokko besser zu schützen.* Auch der Zugang von Immigrant/innen und ihren Kindern zum öffentlichen Bildungs- und Gesundheitssystem und ihre soziale und wirtschaftliche Integration könnten so verbessert werden.
- *Es ist Wunschdenken, dass erzwungene und „widerwillig-freiwillige“ Rückkehr ein wirtschaftliches Entwicklungspotenzial berge.* Generell ist es unrealistisch zu erwarten, dass sozial und wirtschaftlich ausgegrenzte „gescheiterte“ Rückkehrmigrant/innen einen signifikanten Beitrag zur Entwicklung Marokkos leisten. Aus Sicht der Rückkehrer/innen war es gerade die Migration, die persönlichen Aufstieg und Entwicklung versprach und eben nicht die Rückkehr. Daher hegen viele von ihnen den Wunsch erneut zu emigrieren. Ihre gezwungene oder „freiwillige“ Rückkehr verstärkt zudem oft das Gefühl der Ausgrenzung.
- *Anstatt von erzwungenen und „widerwillig-freiwilligen“ Rückkehrmigrant/innen unternehmerische Aktivitäten zu erwarten, sollten Maßnahmen eher auf ihre psychosoziale Unterstützung abzielen, um so Belastungen und Leiden zu verringern.* Da sie sich oft darüber bewusst sind, dass ihre Rückkehr als Scheitern angesehen wird, ist die Vorstellung, man könne sie zur Reintegration zwingen, unverständlich. Zumal die meisten Rückkehrer/innen hierzu gar nicht oder nur widerwillig bereit sind. Das trifft besonders auf diejenigen zu, die unter psychosozialen Problemen leiden, sich im Herkunftsland nicht willkommen fühlen, keine familiären Ressourcen vorweisen können und/oder kein Interesse haben, Investitionen zu tätigen.
- Generell sollten *Maßnahmen verstärkt auf vulnerable Gruppen, wie marginalisierte Rückkehrer/innen sowie Flüchtlinge und Migrant/innen in Marokko, abzielen.* Die Regierungen Marokkos und europäischer Länder haben sich bisher einseitig auf die Förderung ökonomischer Investitionen konzentriert und die Erfolgsgeschichten besonders leistungsfähiger und hochqualifizierter Rückkehrmigrant/innen in den Vordergrund gestellt. Dabei benötigt diese Migrantengruppen die Unterstützung weitaus weniger als die der marginalisierten und „gescheiterten“ Rückkehrmigrant/innen.

Résumé

Cette étude démontre l'évolution récente de la migration vers et à destination du Maroc ainsi que sa contribution potentielle au développement du pays. Elle met en lumière la manière dont le Maroc est devenu une terre d'émigration de premier rang à partir des années 1960. La diaspora marocaine compte plus de 3 millions de personnes en Europe, alors que de plus petites communautés de migrants marocains vivent dans d'autres régions du monde. La crise économique mondiale de 2008 a entraîné un ralentissement de l'émigration, mais relativement peu de migrants sont définitivement retournés dans leur pays. Comme cela avait été le cas avec les restrictions mises en place par des pays de destination du nord-ouest européen après la crise pétrolière de 1973, l'introduction par l'Espagne et l'Italie de l'obligation de visas en 1990-91 a interrompu la circulation et a stimulé l'installation permanente de travailleurs marocains. Une migration familiale à grande échelle s'en est suivie.

Bien qu'étant avant tout un pays d'émigration, le Maroc connaît depuis 2000 une immigration croissante de migrants et de réfugiés venant de pays subsahariens et de Syrie. Alors que certains considèrent le Maroc en premier lieu comme un « pays de transit », un nombre croissant de personnes qualifiées d'Afrique subsaharienne ainsi que des Européens migrent vers le Maroc pour y travailler, étudier ou créer des entreprises. La présence croissante d'immigrants a suscité un réexamen des politiques marocaines d'immigration et notamment une campagne récente de régularisation. Malgré le fait que ces tendances ne laissent pas obligatoirement présager une transformation du Maroc en un pays d'immigration nette, l'émigration pourra décroître et l'immigration s'accroître dans un scénario propice de stabilité politique et de croissance économique équilibrée.

Parallèlement à l'émigration continue, les transferts d'argent des migrants ont considérablement augmenté pour atteindre 7 milliards de dollars US en 2010, ce qui correspond approximativement à six ou sept pour cent du PIB marocain et à environ six fois le montant de l'aide publique au développement. Les transferts d'argent contribuent de manière significative aux revenus familiaux, à la réduction de la pauvreté et à la hausse des taux de scolarisation dans les régions d'origine des émigrés. Il importe toutefois de ne pas surestimer l'impact de la migration sur le développement. En dépit des avantages

considérables qu'elle apporte aux familles et communautés, la migration ne peut généralement éliminer à elle seule les contraintes structurelles du développement. Ces dernières consistent principalement (i) en restrictions à l'immigration qui interrompent la migration circulaire et limitent les possibilités de migration de personnes relativement pauvres, et (ii) en des conditions peu propices à l'investissement au Maroc, particulièrement sous forme de barrières bureaucratiques, de problèmes de reconnaissance de diplômes étrangers, de corruption et de manque de sécurité juridique, en particulier en ce qui concerne la propriété de terrains, de biens immobiliers et autres.

Afin de mieux comprendre la diversité des expériences vécues par les migrants de retour et leur apporter un soutien plus efficace, cette étude opère une distinction entre quatre catégories de « migrants de retour » : (1) *les migrants de retour involontaire* : des migrants irréguliers qui ont été renvoyés au Maroc et qui fréquemment souffrent de graves problèmes psycho-sociaux et de marginalisation ; (2) *les migrants de retour volontaire peu qualifiés* : il s'agit principalement de retournés récents, en particulier ceux dont le retour s'est effectué de manière techniquement volontaire, mais plutôt à contrecœur ; ce sont essentiellement des migrants revenant d'Italie et d'Espagne à la suite de la crise économique mondiale de 2008 ; (3) *les migrants de retour volontaire hautement qualifiés* : des Marocains ayant fait des études et/ou travaillé à l'étranger, partis souvent avec l'intention explicite de se réinstaller et/ou d'investir au Maroc ; et (4) *les « quasi-retournés » de seconde génération* : des enfants de travailleurs immigrés ayant réussi économiquement et qui souhaitent investir. Les migrants et réfugiés de l'Afrique subsaharienne qui vivent au Maroc participent activement à la croissance économique du pays par leur travail et la création d'entreprises du secteur formel ou informel. De nombreux employeurs ont une préférence pour les migrants subsahariens en raison de leur forte motivation au travail, de leurs connaissances linguistiques et d'autres qualifications. Cela est contradictoire au fait que la société marocaine perçoit le migrants comme un poids à supporter. Néanmoins, le peu de droits dont disposent les migrants, leur fréquente exploitation et leur confrontation au racisme et à la discrimination constituent des obstacles à leur intégration dans la société marocaine et à leur contribution à l'économie du Maroc.

Les approches politiques devront être adaptées aux besoins et à la situation socio-économique de ces différents groupes de migrants. Les recommandations politiques formulées ci-après visent à minimiser les risques de marginalisation des migrants de retour et des immigrants au Maroc et à faciliter leur intégration socio-économique :

■ *Appui au développement d'entreprises par des migrants de retour et des immigrants devrait se concentrer sur ceux qui sont fortement motivés et capables de créer des petites et moyennes entreprises.* Aide, conseils et formation en matière de création d'entreprises et un possible soutien pour l'achat de quelques équipements (dans le cas de migrants de retour et d'immigrants démunis) peuvent générer des résultats positifs.

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■ Étant donné que les gouvernements et les ONG s'ingénient à aider de plus en plus de migrants de retour, les ressources distribuées sont souvent minces, ce qui diminue l'efficacité des programmes. *Il semble par conséquent plus sage de fournir davantage de moyens financiers et de conseils à un plus petit groupe de migrants de retour fortement motivés.*

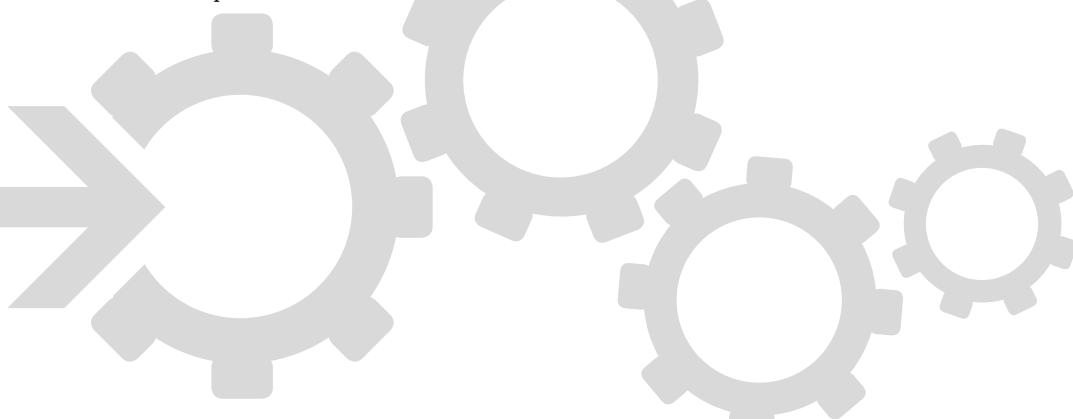
■ Les immigrants subsahariens et les migrants de retour (en particulier les « quasi-retournés » de seconde génération) qui souhaitent travailler mais sont insuffisamment qualifiés, ou bien ceux dont les qualifications acquises à l'étranger ne sont pas reconnues, pourraient obtenir plus facilement des permis de travail et bénéficier d'un *soutien financier pour une formation professionnelle certifiée et des cours de langue et d'intégration* au Maroc. Ils pourraient ainsi s'insérer dans le marché du travail du secteur formel.

■ *Une législation modifiée et une mise en application plus efficace des réglementations existantes sont nécessaires en matière de protection des droits sociaux et de travail des immigrants au Maroc.* Ceci leur permettrait d'accéder, ainsi que leurs enfants, à l'éducation et aux services de santé. Cela facilitera leur intégration sociale et économique dans la société marocaine.

■ *C'est se bercer d'illusions que d'associer développement économique à retour forcé et retour « volontaire à contrecœur ».* Il n'est généralement guère réaliste d'attendre des retournés ayant « échoué » et qui sont marginalisés socialement et économiquement qu'ils contribuent de manière significative au « développement » au Maroc. Or, du point de vue de ces retournés, migrer représentait la possibilité de progrès personnel et de progrès et de développement personnel. En fait, beaucoup d'entre eux souhaiteraient repartir. Leur retour forcé ou volontaire accroît souvent leur sentiment de marginalisation.

■ Au lieu de croire qu'ils deviendront entrepreneurs, *l'aide aux migrants dont le retour a été forcé ou était « volontaire à contrecœur » devrait donc être axée sur un soutien psychosocial destiné à soulager leur désarroi et leurs souffrances.* Ces migrants sont conscients du fait que leur retour est synonyme d'échec et, partant, il n'est guère concevable que cette catégorie de personnes puisse être forcée à se réintégrer à la société. De plus, ils sont fréquemment peu disposés à le faire. Cela s'applique en particulier à ceux qui souffrent de problèmes psychosociaux et à ceux qui ne se sentent pas acceptés chez eux, n'ont pas de ressources familiales et ne sont pas motivés à investir.

■ D'une manière générale, *l'accent devrait être mis sur un soutien aux retournés vulnérables et marginalisés ainsi qu'aux réfugiés et immigrants au Maroc.* Le gouvernement marocain et les gouvernements européens ont jusqu'ici unilatéralement centré leurs efforts sur l'appui à l'investissement économique et sur la réussite de retournés hautement performants et qualifiés. Or, ces derniers ont bien moins besoin de soutien que la catégorie oubliée des migrants de retour qui n'ont pas réussi et sont depuis marginalisés.



1 Introduction

Over the second half of the 20th century, Morocco has evolved into a prominent emigration country. Moroccans form one of the largest and most dispersed migrant communities in Europe. The country's current population is about 33 million, and more than 3 million people of Moroccan descent are living in western and southern Europe. Smaller numbers of Moroccan migrants live in Algeria, Tunisia and the Gulf states. Recently, a smaller but growing number of Moroccan migrants have settled in Canada and the United States. The Moroccan Government claims that the global Moroccan diaspora includes around 4 million people, an estimate which captures all people of Moroccan descent, including second and third generations.

Over the past decade, changing migration patterns have set the stage for potentially far-reaching changes to Moroccan society, its economy, demographics and legal system. Although Morocco remains primarily a country of emigration, its emigration potential may decrease in the future because of demographic, cultural and economic changes. At the same time, Morocco is also gradually becoming a destination for migrants and refugees from sub-Saharan Africa and the Middle East and, to some extent, even from European countries hit by the economic crisis. Although numbers are still limited, the growing presence of immigrants and their settlement in big cities such as Rabat, Casablanca, Marrakesh, Fez, Tangier, Nador and Oujda presents Moroccan society with an entirely new set of social, cultural and legal 'integration' issues typical for immigration countries. These issues do not always fit with Morocco's self-image as an emigration country, although this has been changing in recent years. The country's evolving migratory status has created a need for significant changes in the institutional framework, and these were set in motion in 2013, with an announcement by King Mohammed VI about the legalisation of irregular migrants in Morocco.

While Moroccan migration was largely unaffected by the Arab Spring upheavals, with the exception of the increasing presence of Syrian refugees on Moroccan soil, migration has been a thorny issue in relations between Morocco and the European Union. While the EU has engaged Morocco in efforts to reduce irregular emigration and 'transit' migration, and while the country is collaborating with Spain on the issue of border controls, Morocco's position is inherently ambiguous. On the one hand, it continues

to have a strategic interest in facilitating the mobility of its own citizens, and its key strategic diplomatic goal seems to be the lifting of the European visa restrictions for Moroccan citizens that were imposed in 1990-1991 as part of the Schengen process. On the other hand, regarding the readmission and treatment of 'third-country nationals' (i.e. non-EU and non-Moroccan undocumented migrants) from the EU, Morocco is constrained by its political and economic interest in maintaining good relations with African governments.

This study aims to give an overview of recent Moroccan migration trends, with a particular focus on understanding how recent changes in migration can be explained by economic, political and demographic transformations in Morocco, as well as changing conditions in European destination countries and (predominantly) African origin countries. By grounding the analysis of contemporary migration trends in an examination of long-term migration and development trends, the study aims to understand and explain continuities and discontinuities in migration patterns. Furthermore, by exploring the developmental drivers and potentials of Moroccan migrations, the study analyses the factors affecting Morocco's changing migration patterns and considers to what extent Morocco has become a transit and destination country and which factors can explain this. Particular attention is given to:

- Identifying the drivers of migration to, from and through Morocco and analysing the extent to which changing migration patterns can be understood in terms of social, political and economic developments in Morocco, Europe and Africa as well as recent migration policy changes in Morocco (such as the legalisation of irregular migrants and the development of integration policies for migrants in Morocco).
- Assessing the developmental impacts and potentials of changing migration patterns and trends, based on an analysis of changing structural developmental conditions in Morocco as well as destinations of Moroccan migration.
- Identifying ways of maximising the developmental potentials of emigration and immigration for Moroccan society.

Through an analysis of changing Moroccan migration patterns, this study gives particular attention to: (i) regular and irregular emigration of Moroccans to Europe; (ii)

return and reintegration of Moroccan emigrants; (iii) migrants and refugees from sub-Saharan Africa, whether 'in transit' or settling in Morocco. The study identifies the economic and policy factors that explain increasing migration to Morocco and affect the duration of stay and modes of 'integration' into Moroccan society.

This study is intended to provide strategic background information for the projects carried out through German development cooperation in the field of migration:

- 1 RECOMIG (Renforcement des capacités des collectivités territoriales dans le domaine migratoire/Strengthening elected municipalities in the management of migration): Financed by the German Federal Ministry for Economic Cooperation and Development (BMZ) as part of its special initiative Stability and Development in the MENA Region, this project aims to support local authorities in Morocco in integrating regular migrants, refugees and returning Moroccans and, in this way, reduce the potential for latent conflicts between migrants and the local population. The project is implemented in partnership with the Ministry of Moroccan Living Abroad and Migration Affairs (MCMREAM) and is running from January 2015 to December 2017.
- 2 RECOSA (Renforcement des collectivités territoriales dans l'amélioration des structures d'accueil des migrants/Strengthening of Moroccan communities in improving reception facilities of migrants): This project aims to strengthen coordination and communication at the national level and between the national and local levels. It also supports the improvement and the expansion of integration services and infrastructure at the local level. The project is also implemented in partnership with MCMREAM and is running from January 2016 to December 2019.
- 3 As part of the German-Moroccan Partnership for Asylum and International Refugee Protection, GIZ is providing support to Moroccan national authorities in establishing an asylum system in accordance with international standards. The project, which is running from February 2015 to December 2017, is funded by the German Foreign Office and implemented in partnership with MCMREAM.

This study is based on three main data sources. Firstly, statistical sources are used to study the evolution of migration patterns to and from European and North American

destination countries. Particular use has been made of the databases of the DEMIG (Determinants of International Migration) project, which contain bilateral (country-to-country) migration flow data, and on the basis of which it was possible to estimate yearly Moroccan emigration to the main destination countries in Europe and North America. These data have been supplemented by recent migration data sourced from national statistical offices. In order to assess migration trends following the global economic crisis (GEC), the study focuses on the cases of Spain and Germany, partly because their statistical offices have good and relatively reliable register data on migration. Secondly, the main analysis in the study is based on a review of the existing research literature on Moroccan migration and its links to development trends. Thirdly, in April 2016 the author conducted interviews with 15 stakeholders (return migrants, NGOs and other organisations assisting return migrants and sub-Saharan immigrants in Morocco¹). These interviews were particularly beneficial in terms of the insights they provided into how to facilitate the social and economic (re-)integration of both Moroccan return migrants (from Europe) and immigrants (predominantly from sub-Saharan Africa) in Morocco.

Following this introduction, section 2 of this report will start by giving an overview of the evolution of Moroccan emigration between 1950 and 2015 and analysing the causes of changing migration trends as well as the factors contributing to the establishment of a large Moroccan diaspora in Europe. Section 3 will assess recent trends in the migration of sub-Saharan Africans and Europeans to Morocco and the nascent emergence of immigrant communities on Moroccan soil. Section 4 will assess future scenarios for Morocco, focusing particularly on whether the country may have decreasing emigration potential and may become a destination country in the future. Section 5 will focus on the development impact of migration and remittances. It will look particularly at the factors explaining the varying degrees of success of different categories of return migrants. It will also assess the integration of immigrants in Morocco and their potential to contribute to economic development. The conclusion will briefly summarise the main findings and give a number of policy-relevant insights.

¹ Hereafter referred to simply as 'stakeholders'.

2

Emigration from Morocco

2.1 Evolution of Moroccan emigration 1950-2015

Over the second half of the 20th century, Morocco became a prominent emigration country. Since the early 1970s, there has been remarkable continuity in Moroccan emigration, and it has become more diversified. Levels of migration and settlement have remained high despite – and paradoxically in part as a result of – European immigration restrictions. Today, Morocco is one of the world's leading emigration countries, with a global diaspora estimated at around 4 million, while the domestic population is about 34 million. As it is not possible to renounce Moroccan nationality, this estimate includes the second and third generations as well as persons whose mother or father is a Moroccan national.

Contemporary Moroccan emigration patterns are deeply rooted in colonialism (de Haas 2014). The colonisation of neighbouring Algeria by France in 1830 encouraged Moroccans to engage in increasing seasonal and circular labour migration to Algeria. Morocco's own colonial era (1912-1956) marked the beginning of migration to France, mainly for industrial work or following recruitment into the French army in the First and Second World Wars. When France stopped recruiting Algerian workers during the Algerian War of Independence (1954-1962), recruitment and migration of factory and mine workers from Morocco was boosted, a pattern which continued after Morocco's independence in 1956.

Yet this post-colonial migration was modest compared with the decade 1962-1972, when strong economic growth in western Europe resulted in high demand for low-skilled labour. Labour recruitment agreements with West Germany (1963), France (1963), Belgium (1964) and the Netherlands (1969) prompted a geographical diversification of Moroccan emigration and expanded its overall scope. Between 1965 and 1972, the estimated number of registered Moroccans living in the main European destination countries increased tenfold, from 30,000 to 300,000. These figures further increased to 700,000 in 1982, 1.6 million in 1998, and 3.1 million in 2012 (de Haas 2014).

While Moroccan emigration has always concentrated on Europe, smaller but substantial numbers of Moroccans have also emigrated to other Arab countries and Israel. Since the 1970s, approximately 120,000 Moroccans have migrated to Libya and several tens of thousands to the

oil-rich Gulf countries, mainly to work on temporary contracts. Moroccan Jews followed a distinct pattern, emigrating in massive numbers to France, Israel and Canada after the creation of the state of Israel in 1948 and the Six Day War of 1967. Morocco's Jewish population dwindled from an approximate 250,000 to the current number of about 5,000.

The 1973 oil crisis prompted European governments to freeze recruitment, while the economic recessions of the 1970s and 1980s, declining employment in heavy industries and the closure of mines in Europe led to soaring unemployment among migrant workers. However, the increasing migration restrictions put in place by European states had the unintended consequence of interrupting circulation rather than leading to large-scale return (see also De Mas 1990; Entzinger 1985). This, in turn, had the inadvertent effect of stimulating the permanent settlement of Moroccan workers in Europe (de Haas 2007a). In the same period, the economic situation in Morocco deteriorated and, following two failed coups in 1971 and 1972, the country entered a period of political instability and repression. Initially, many Moroccan migrants came alone and could be seen as 'target earners' who intended to stay for a few years. However, by raising the costs and risks of migrating, restrictions and border controls compelled many migrants to postpone and eventually cancel their return plans.² This encouraged the permanent settlement of migrants in Europe and the growing importance of large-scale family migration. To begin with, this was mainly primary family migration in the form of spouses and children joining the (predominantly male) migrants in Europe. From the 1990s, secondary family migration gained importance through marriages between second-generation young people with European residence permits or nationality and partners living in Morocco.

Settlement followed by large-scale family reunification explains continuous emigration to the classic destinations of France, Belgium, the Netherlands and Germany throughout the 1970s, 1980s and even 1990s. At the same

2 This is consistent with empirical evidence from a large-scale quantitative study, which estimated the effects of visas on migration dynamics. The analysis showed that, on average, visas reduce return flows by approximately the same extent as inflows from the same origin country, hence interrupting circulation and therefore only having a small effect on net migration. It also showed that visa restrictions decrease the responsiveness of immigration to business cycles and labour demand (Czaika and de Haas 2014).

time, increasing demand for low-skilled labour in southern Europe in sectors such as agriculture, domestic and personal care, and construction led to the emergence of Italy and Spain as new destinations for Moroccan migrant workers from the mid-1980s onwards. Partly as a result of the ageing and increasing levels of education of their own populations, the domestic supply of such labour (traditionally carried out by young people and women) in such sectors dried up (see also Reyneri 2001). This led to soaring low-skilled labour migration to Italy and Spain.

Initially, Moroccan migration to southern Europe had a predominantly circular character, as Moroccans could travel back and forth freely to Spain and Italy since no visas were required. Yet in a striking parallel with guest-worker migration, restrictions interrupted intense circulation and made this migration increasingly permanent. In 1990-1991 Spain and Italy introduced visa requirements for Moroccan citizens as part of the Schengen agreement, which required that all signatory states maintain joint Schengen visas (see also Huntoon 1998). Moroccans started to overstay their visas or to migrate illegally across the Strait of Gibraltar. In fact, the introduction of Schengen visas by southern European countries for Moroccans and other African nationals was the start of the phenomenon of irregular boat migration, in which migrants began to increasingly rely on smugglers as a way of circumventing ever-tighter border controls. So smuggling gained importance as a reaction to border controls. In this process, smugglers and migrants have constantly shifted and overseas migration itineraries. As a consequence of the introduction of visas and border controls, migration continued, primarily because of sustained labour demand in southern Europe. Continued migration across formally closed borders also stimulated repeated regularisations ('amnesties') by Italian and Spanish Governments that granted legal status to hundreds of thousands of unauthorised migrants (Bodega et al. 1995; de Haas 2008). This in turn triggered family migration.

Drawing on the best available migration statistics, figures 1 and 2 (and supplementary figures in Annex 1) summarise the migration trends from Morocco over the post-independence period. They show how the movement of workers and family members to France and the guest-worker countries (Belgium, the Netherlands and Germany) dominated emigration until 1990, and how Italy and, particularly, Spain quickly developed into the main desti-

nations of workers and family members in the 1990s and 2000s, paradoxically after they introduced the Schengen visa for Moroccan nationals. In the same period, the United States and Canada (more specifically, the French-speaking Canadian province of Quebec) increasingly developed into destinations mainly for skilled workers and their families. Although the numbers for North America-bound emigration are comparatively small, this emigration has shown a sharply increasing trend (see Annex 1). There is no flow data on Moroccan emigration to the Middle East and Africa. Although these numbers are comparatively small, they seem to be increasing. Morocco is one of the most Europe-oriented countries in the MENA region (Middle East and North Africa) in terms of emigration patterns.

Increasing high-skilled emigration to the United States and Canada, as well as an increasing migration of students to European countries such as France, Spain, Germany and Belgium, reflects structural development trends in Morocco. On the one hand, there has been a dramatic improvement in literacy and in the levels of primary and secondary education, which has partly resulted in a growing desire to pursue studies abroad. On the other hand, Morocco has seen increasing unemployment among higher education graduates, which has obviously stimulated aspirations to seek work abroad. As this increasing emigration of skilled workers and students testifies, the stereotypical image of the quasi-illiterate, rural, economically marginalised Moroccan migrant is less and less tenable. The stakeholder interviews showed that significant numbers of Moroccan students migrate to Europe to pursue higher education degrees. While traditionally, Moroccan student emigration was directed towards France, increasing numbers of Moroccans are searching for study opportunities in other European countries, such as Spain, Germany, Belgium and also Russia. For instance, the stakeholder interviews revealed that Germany has become an attractive destination for Moroccans from non-elite backgrounds: higher education in Germany is virtually free and of high quality, students are allowed to work while studying, and there is a high chance of finding employment. Russia has also been a destination for Moroccan student migrants, for instance in pharmacy and medicine, partly because of high educational standards.

Nowadays, a significant proportion of young Moroccans doing low-skilled work in Europe have secondary or even tertiary education qualifications. Among recent Moroccan

emigrants, there is also an increasing number of women migrating independently to work in jobs in care and agriculture or to study. This contrasts with the situation before the 1990s, when most Moroccan women migrated as their spouses' or parents' dependents as part of family reunification. Although Moroccan labour migration is still predominantly male, this is a significant change from the

past. It can be explained by the changing structure of low-skilled labour demand in (southern) Europe, which has become less industrial and more oriented towards agriculture and domestic services, as well as by the somewhat improved position of women in Moroccan society.

FIGURE 1. MOROCCAN EMIGRATION BY DESTINATION COUNTRIES, 1960-2015

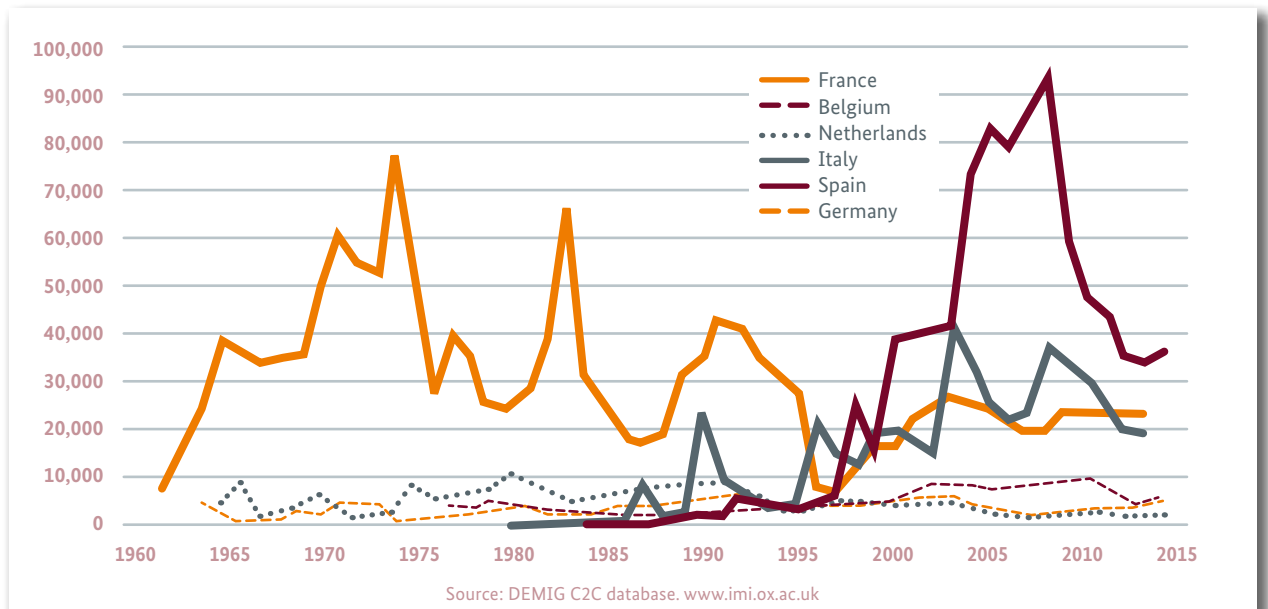
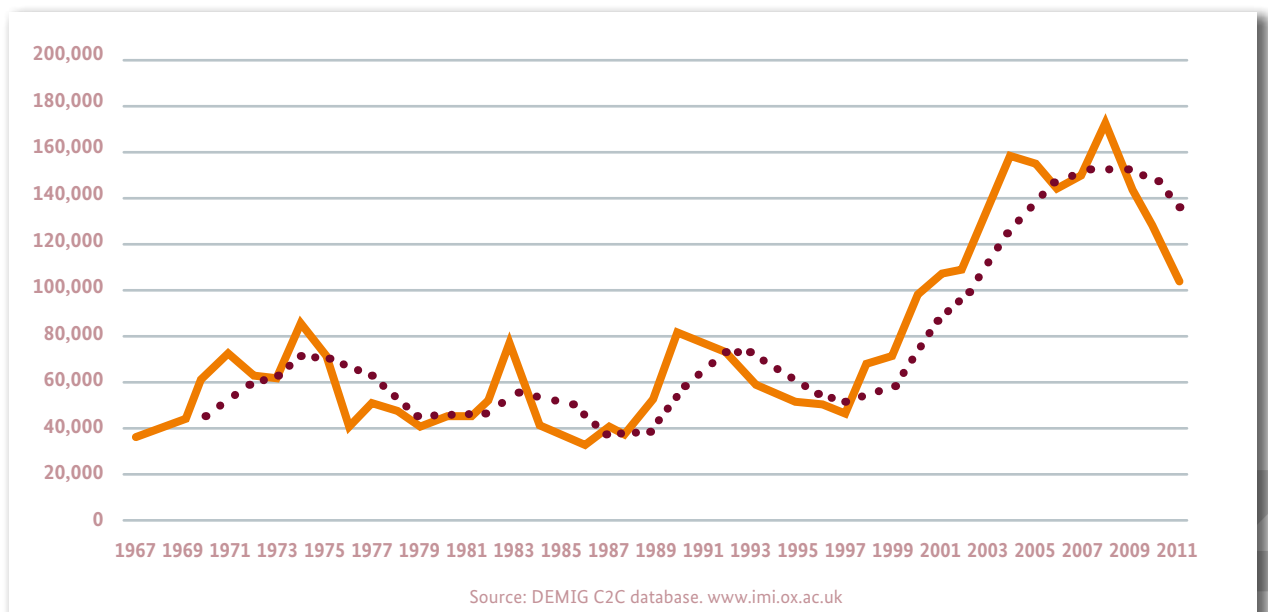


FIGURE 2. TOTAL MOROCCAN EMIGRATION TO MAIN DESTINATION COUNTRIES, 1960-2011



2.2 Recent trends in emigration and return migration

Figures 1 and 2 show that the 2008 global economic crisis (GEC) coincided with a significant slowdown in Moroccan emigration. Particularly in Spain, but also in Italy, the collapse of the construction sector and soaring unemployment in many sectors including agriculture led to a major slump in Moroccan immigration. This is in keeping with the general principles of migration theory that labour demand in destination countries is a major determinant of workers' migration (Massey et al. 1993; Piore 1979) and that economic and demographic factors in origin countries alone are generally not sufficient factors for major labour migration. Worsening economic conditions in Europe, and Italy and Spain in particular, have clearly led to a major decline in Moroccan emigration. On the other hand, as after the 1973 oil crisis, the data also shows that migration has not ceased and that there is remarkable continuity in Moroccan emigration. This can partly be explained by family migration and partly by the continued emigration of labour migrants and students.

From the interviews conducted for this study with stakeholders working for NGOs that assist return migrants, the crisis has hit low-skilled migrant workers working in Italy and Spain particularly hard. This has led to situations of extreme marginalisation and poverty, particularly among migrants with low levels of education who hardly speak the language of destination countries and who either have undocumented status or have lost their residence permit due to prolonged unemployment. Through extensive migrant networks, information about worsening economic conditions in Europe has filtered through the origin regions of migrants and has led people to postpone or cancel their emigration plans, or instead to focus on building a life in Morocco (see also Jolivet 2015).

While it can hardly be surprising that Moroccan emigration has decreased in the wake of the GEC, the real question is whether it has also triggered the large-scale return expected by many observers at the time. The GEC has certainly prompted some migrants to return. For instance, stakeholders reported that in the Tadla region around Beni Mellal, from where many people migrated to Italy in the 1990s and 2000s, often by irregular means (illegally by boat, or overstaying their visas), there was an initial upsurge of returns until 2009 of both voluntary and in-

voluntary (deported) migrants. However, this crisis effect seems to have tailed off, and return levels have subsided. So, the GEC may have prompted the return of those who intended to return anyway, while others have stayed put. This could suggest a repetition of the situation following the 1973 oil crisis, which also did not lead to the anticipated massive returns, partly because people abstained from returning owing to the prevailing immigration restrictions and the fear that these might be further tightened in the future. To gain a better insight into post-2008 (GEC) Moroccan migration and return dynamics in both southern and northern Europe, the remainder of this section focuses on migration to and from Spain and Germany.

The Moroccan–Spanish case: limited returns and onward migration

Figure 3 shows that immigration of Moroccan nationals to Spain dropped sharply after peaking at 92,000 in 2008 to around 35,000 per year, while emigration of Moroccan nationals hovered at between 30,000 and 37,000 annually in the period from 2011 to 2014, resulting in almost zero net migration. However, the figure also shows that only between 2,500 and 3,000 foreign nationals (about 10% of all Moroccan nationals leaving Spain) have been returning to Morocco. However, these data are likely to underestimate the real rate of return to Morocco, particularly with regard to temporary returnees who have little incentive to deregister in Spain. This particularly applies to 'pendulum migrants', who spend part of the year in Morocco and part of the year in Europe. The stakeholder interviews indicated that is especially popular among slightly older and/or unemployed migrants (see de Haas and Fokkema 2010). While there are many indications that such pendular migration movements are widespread, they do not show up in official statistics.

Nevertheless, based on the analysis of available data it seems safe to assume that the majority of Moroccans who left Spain over this period have in fact not returned to Morocco, but have engaged in secondary migration to other, northern European destination countries to join their families there and search for better economic opportunities. Although more evidence is needed to substantiate this claim, this would also fit with the onward migration patterns of other migrant groups in Spain, such as Ecuadorians and Colombians moving to London (see Mas Giral 2016; Ramos 2015, Ramos 2016). Such secondary migration is particularly attractive for Moroccans with

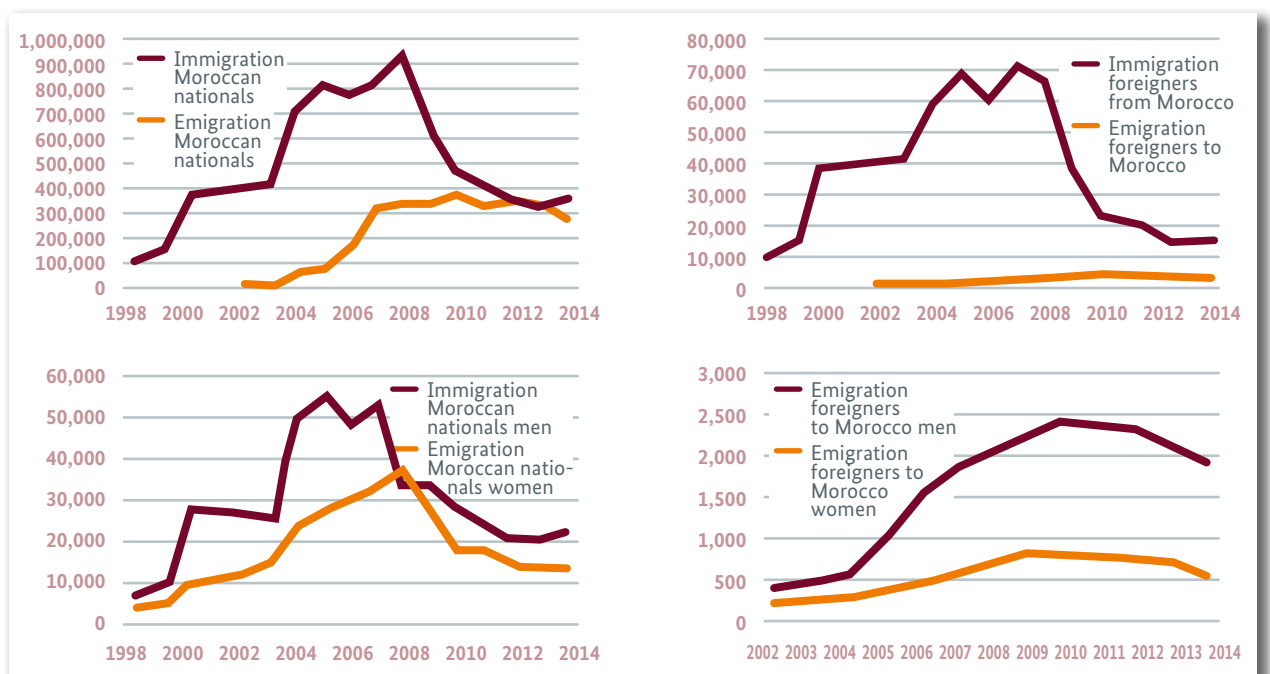
permanent residence permits, as they enjoy quasi-free mobility within the EU, as do Moroccans who took up Spanish citizenship. In this sense they may simply have been joining the new flow of native Spanish unemployed youth who have migrated to countries such as Germany and the United Kingdom in search of better economic opportunities (see Glorius 2016; Ramos 2015).

Figure 3 also shows that in the pre-crisis period of economic prosperity, immigration of Moroccan citizens to Spain (irrespective of their previous country of residence) was higher than immigration of foreigners (all nationalities) from Morocco. This presumably reflects secondary migration of Moroccans possessing citizenship of other European countries to Spain. So, after the crisis some of these Moroccan migrants may have returned to their initial countries of settlement. This suggests a significant degree of intra-European mobility of Moroccan migrants, who are often connected through extensive family and community networks.³

So, while economic crises and high unemployment among migrants living in Europe, and especially in Spain and Italy, led to fewer departures from Morocco and increased onward migration to other European countries, it has affected permanent returns to Morocco to a significantly lesser degree. Immigration restrictions partly explain the rather low tendency to return permanently. Undocumented migrants and those only possessing temporary residence permits tend to stay put in countries like Spain and Italy out of fear of not being able to move back to Europe. At the same time, naturalised migrants or those possessing long-term or permanent residence permits have engaged in secondary migration to other European countries, while others return to Morocco for several months a year without ever deregistering in Spain.

Gender-specific breakdowns of Spanish–Moroccan migration reveal interesting similarities and differences between the migration of men and women. The immigration of both Moroccan men and women seems to react to

FIGURE 3. MIGRATION TO AND FROM SPAIN, 1998-2014⁴



Source: National Statistic Institute, Spain

3 Research on secondary migration within Europe by another migrant group, the Senegalese, suggests that the low-skilled, the self-employed and the unemployed, as well as those lacking longer-term residence permits, are the most likely to remigrate within Europe. The study also showed that the presence of relatives and friends in the country of settlement discourages remigration, whereas social ties in other European countries encourage onward mobility within Europe (Toma and Castagnone 2015).

4 These graphs depict (clockwise from top left): yearly in- and outflows of Moroccan nationals to and from Spain; immigration to Spain from Morocco and from Spain to Morocco (irrespective of nationality); emigration of foreigners from Spain to Morocco by gender; and immigration of Moroccan nationals by gender.

economic trends. This may partly reflect that, in contrast to guest-worker migration, many Moroccan women have migrated to Spain (and Italy) for work because of increasing demand for female labour in agriculture, domestic work, personal care and other (formal and informal) service sector jobs. The increasing immigration of Moroccan women is in part accounted for by family reunion, but it is safe to assume that the timing of family reunion is also sensitive to labour market demand to some extent. Yet the data also show that Moroccan migrant women have a much lower inclination to return than men. On the one hand, this seems to reflect a general trend in Moroccan migration, in which women prefer to stay once they have joined their families in Europe. This comparatively lower return tendency among women seems to be partly explained by the fact that they generally prefer to stay with their children in Europe and that they have more legal rights and social security in Europe than in Morocco (see also de Haas and Fokkema 2010). On the other hand, the lower return tendency among women may also be linked to the fact that in Spain many migrant women work in sectors that are less sensitive to economic cycles, such as domestic and care work. Although most analyses on this relate to Latin American women working in similar sectors (see also OECD 2006: 214), this also seems to apply to Moroccan migrant women. In addition, the stakeholder interviews indicated that sectors in which many Moroccan men worked, such as agriculture and, in particular, construction, have suffered much more from the crisis, resulting in widespread job losses both in Spain and in Italy.

The Moroccan–German case: limited returns and continued immigration

Moroccan migration dynamics to and from Germany are indicative of a somewhat different pattern which is more typical for the guest-worker countries (see Figure 4). First, it strongly suggests that immigration from Morocco to Germany has almost always eclipsed migration in the reverse direction.⁵ Second, it shows that levels of net immigration are strongly correlated to economic cycles as measured by gross domestic product (GDP) per

⁵ Although the data reflect destination and origin counties, and not nationality or country of birth, it is safe to assume that the bulk of migration from Germany to Morocco concerns people with a Moroccan background, as few native Germans live in Morocco.

capita growth.⁶ Third, emigration to Morocco (which overwhelmingly reflects return migration⁷) is more stable and less reactive to economic cycles than immigration. This reflects general theoretical and empirical insights on migration processes: once migrants are settled, the building-up of social ties at the destination and the risks involved in returning given immigration restrictions often discourage migrants from returning.

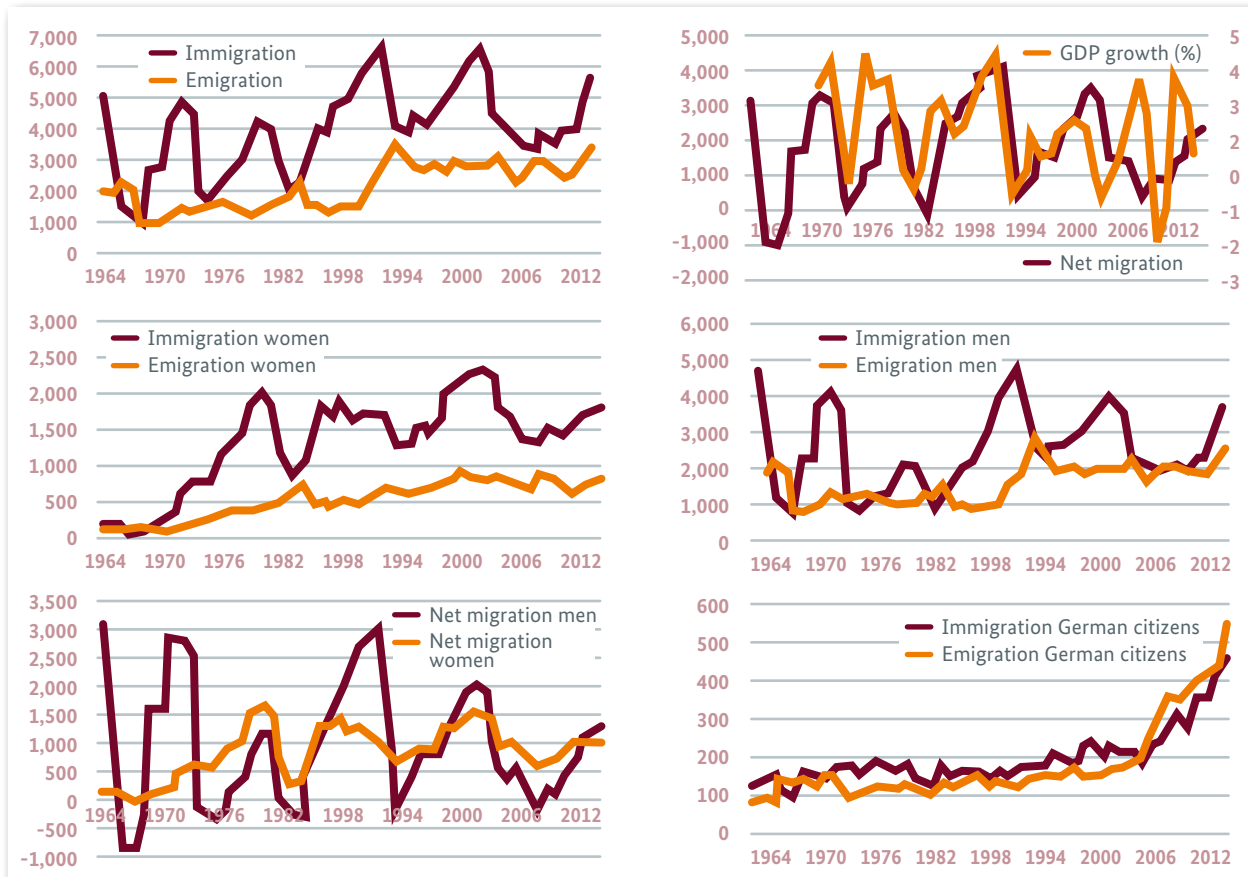
Fourth, it suggests that fluctuations in immigration and emigration of men from and to Morocco are more strongly correlated to economic cycles than the immigration and emigration of women. Since work is often the prime migration motive for men, their migration decisions are more likely to respond to economic cycles and labour demand in Germany. Although there is also a positive correlation between net migration of women from Morocco to Germany and German economic cycles, female immigration is much less volatile than male migration.

As was the case with Moroccan–Spanish migration, return rates also seem much lower among men. The present study calculated the ‘return shares’ by adding up annual immigration over the entire measurement period. While, according to register data, between 1964 and 2014 200,506 migrants moved from Morocco to Germany, 53% (106,684) of this figure moved in the opposite direction. Breaking this down by gender: according to official data, 130,123 men migrated from Morocco to Germany between 1964 and 2014, and 61% (80,013) went in the opposite direction. However, while 70,383 women migrated from Morocco to Germany, only 38% (26,671) moved from Germany to Morocco. This confirms a general pattern also seen in the data from Moroccan–Spanish migration: women tend to migrate less, but when they migrate, they are much more likely to stay. So, both the in- and outflow volatility of female migration is much lower. We can therefore conclude that immigration of Moroccan women generally has a more permanent character.

⁶ In the graph, we calculated the (moving) average of GDP per capita growth of the current and previous years. The lines in the graph suggest that immigration follows economic trends rather closely, although the migratory response is somewhat lagged. This may partly be explained by the fact that employment trends often lag behind economic trends as well as the fact that information about worsening or improving job market conditions may spread and take hold in origin communities with some delay.

⁷ The only exception being second- and third-generation German-Moroccans and non-migrant Germans moving to Morocco, which are in all likelihood relatively small groups.

FIGURE 4. MIGRATION TO AND FROM GERMANY, 1964-2014⁸



Source: Federal Statistical Office, Germany

Interestingly, although migration from Morocco to Germany was low around the 2008 global economic crisis, net migration from Morocco to Germany rebounded in subsequent years. Although further research is needed to fully understand this phenomenon, it is likely that it is partly related to the relative health of the German economy compared to most other destination countries, and Spain in particular. It is striking that while migration from Morocco to the Netherlands, which was the second most important destination country in the 1980s, has decreased to a trickle in recent years, migration to Germany is increasing. More research is needed to explain this phenomenon, but this might indicate that Germany is a more attractive destination for skilled Moroccan workers and students because of more attractive labour market conditions and its attractive education system (see above).

⁸ These graphs depict yearly flows to and from Germany, irrespective of nationality, with exception of the bottom right graph.

Because not all migration is recorded, these data may actually underestimate the true extent of secondary migration from other European destinations (such as Spain) to Germany, particularly in the wake of the crisis. As with the Spanish data, official data about Germany may also underestimate the rates of temporary and permanent return to Morocco, particularly among Moroccan migrants without German citizenship, who may avoid deregistering out of fear of losing residency status. Although the numbers are still relatively small, the fact that immigration and emigration of German citizens⁹ to and from Morocco is nearly balanced out seems to confirm that overall rates of circulation (back-and-forth movements) tend to be higher

⁹ German citizens' include all German citizens moving between Morocco and Germany, irrespective of their original citizenship. Although it is likely that a sizeable share of this figure is accounted for by the increasing numbers of Moroccan citizens who have acquired German citizenship, the data is not broken down by people who acquired German citizenship at birth and previous Moroccan citizens.

among migrants whose movement is not constrained by migration barriers.

In 2015 Germany experienced an unprecedented level of irregular immigration of Moroccan asylum claimants who joined the boat migration of Syrian, Afghan and Iraqi asylum seekers from Turkey to Greece, and from there overland to Germany. According to the German Federal Office for Migration and Refugees, around 10,000 Moroccans came to Germany in 2015, but only around 3.7% were given asylum. In February 2016, the Moroccan and German Governments agreed to deport those Moroccans whose asylum claims had been rejected.¹⁰ From a more long-term perspective, this migration should be seen as the latest attempt in a decades-old ‘cat-and-mouse game’ in which Moroccan migrants have continually shifted strategies in seeking alternative legal channels and geographical itineraries for entering Europe as a reaction to border controls. Turkey has also become an attractive staging ground for illegal entry into Europe because Moroccans enjoy visa-free travel to Turkey.

2.3 Naturalization and the establishment of the Moroccan diaspora

The increasingly permanent character of Moroccan migration to Europe is exemplified by high naturalisation rates and comparatively low return migration compared to other immigrant groups in Europe.¹¹ Figure 5 shows how naturalisation peaked in the 1990s and 2000s in the traditional destination countries, and how it started to rise in Italy and, particularly, Spain in more recent years. Between 1992 and 2012, some 430,000 Moroccan citizens acquired citizenship of nine important European destination countries¹². While high naturalisation rates¹³ reflect and further solidify the permanent character of Moroccan migration and settlement in Europe, they are also a reaction against immigration restrictions, as migrants see acquisition of citizenship as a means of guaranteeing free mobility. Particularly in the context of crises, xenophobia, and immigration restrictions, naturalisation is the best guarantee for preserving residency rights as well as obtaining free mobility rights from the perspective of migrants.

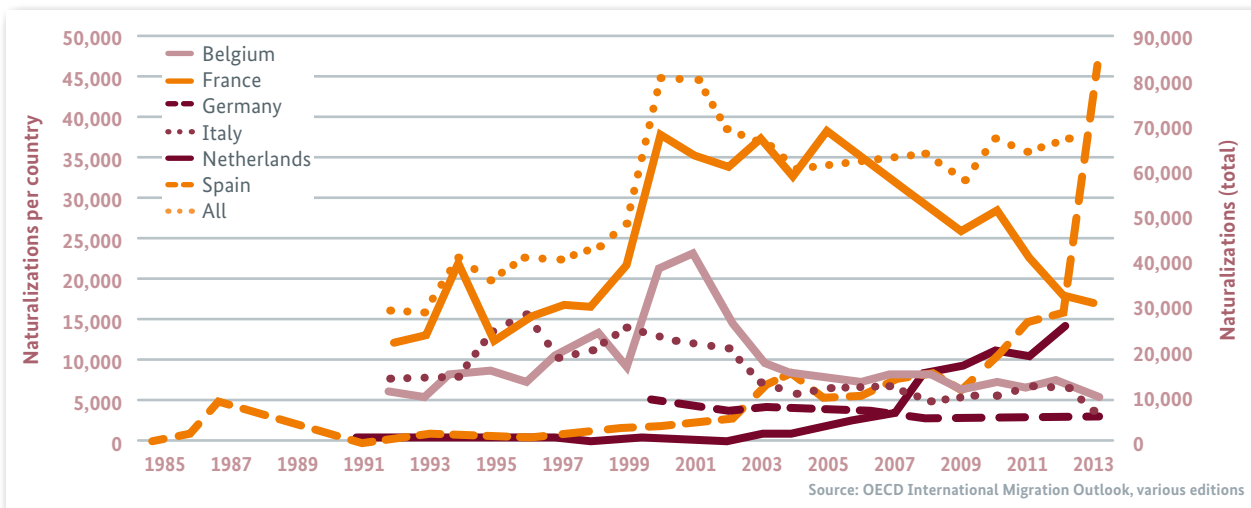


FIGURE 5. NATURALIZATION OF MOROCCAN CITIZENS IN EUROPE, 1985-2013

11 According to estimates based on available data from the DEMIG database, about one quarter of emigrants who left Morocco between 1981 and 2009 returned to Morocco (de Haas 2014).
 12 These calculations were made with naturalisation data from France, Belgium, Denmark, France, Germany, Italy, the Netherlands, Norway and Spain provided in the yearly editions of OECD's International Migration Outlook.
 13 Although the peak in Spanish naturalisations partly reflects a change in administrative procedures it is beyond doubt that Moroccans living in Spain increasingly opt for naturalisation. Source: Personal communication with María Villares-Varela, University of Birmingham.

10 Deutsche Welle website, (2016). Berlin and Rabat agree to send back Moroccan migrants. [online] Available at: <http://www.dw.com/en/berlin-and-rabat-agree-to-send-back-moroccan-migrants/a-19082449> [Accessed 7 April 2016].

Figures 6 and 7 show the extraordinary growth and size of the Moroccan heritage population between 1968 and 2012. These estimates include both people born in Morocco and the second and third generation. Over the second half of the 20th century, Morocco has evolved into one of the world's leading emigration countries, with the global Moroccan diaspora estimated at around 4 million. Moroccans form one of the largest and most dispersed migrant communities in Europe. More than 3 million people of Moroccan descent currently live in western and southern Europe. This is equal to more than 10% of the total Moroccan population.

Recently, a smaller but growing number of Moroccan migrants have settled in Canada and the United States.

2.4 The role of immigration policies

The above analysis suggests that by encouraging permanent settlement immigration restrictions have consolidated the permanent presence of Moroccan migrant communities in Europe. The continuation of Moroccan migration has been made particularly possible through

FIGURE 6. MOROCCAN HERITAGE POPULATION IN MAIN EUROPEAN DESTINATION COUNTRIES, 1968-2012

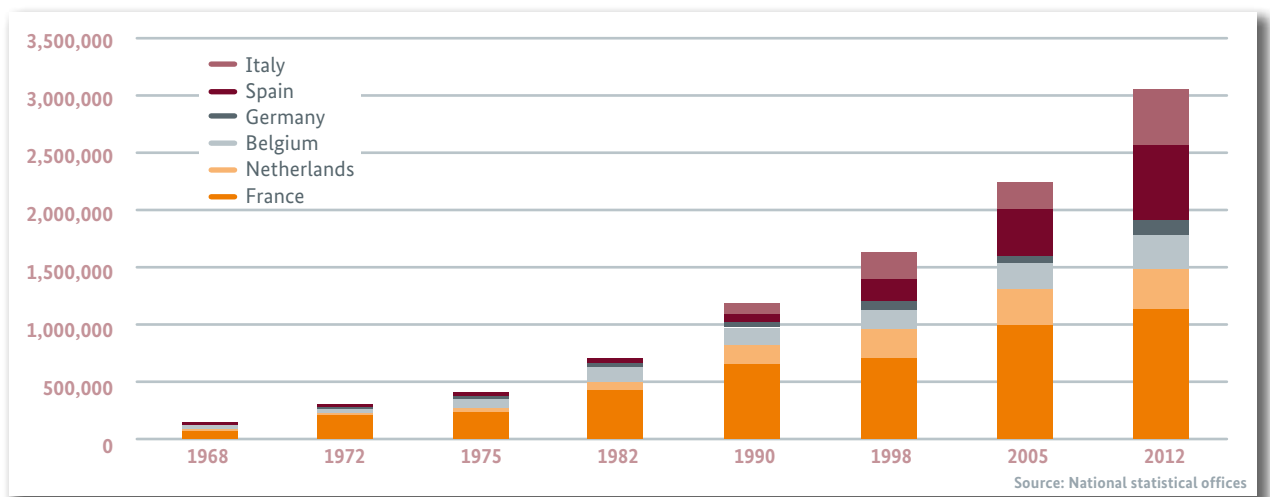
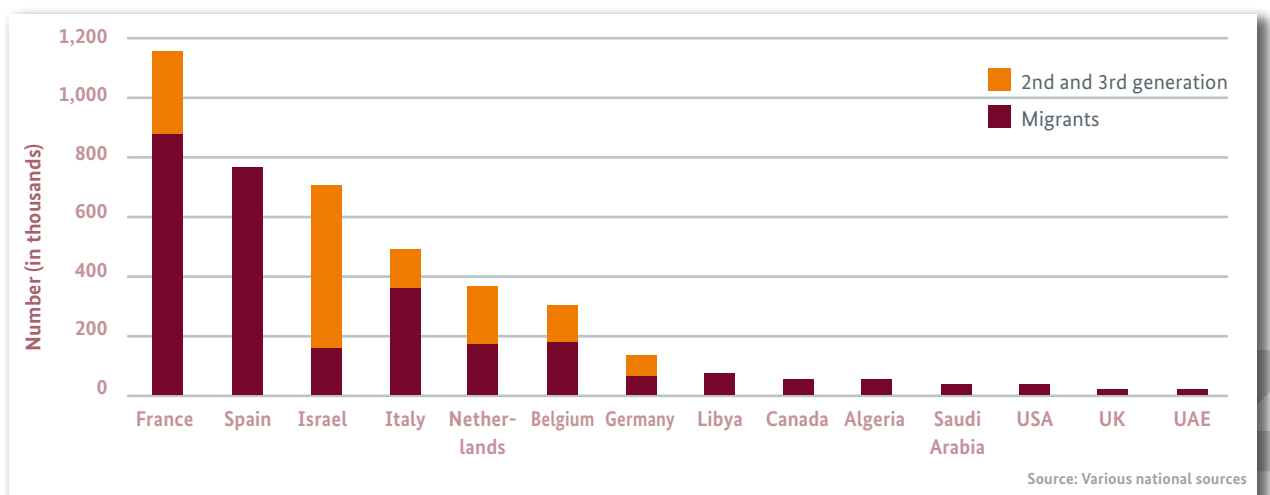


FIGURE 7. THE MOROCCAN DIASPORA (2010)

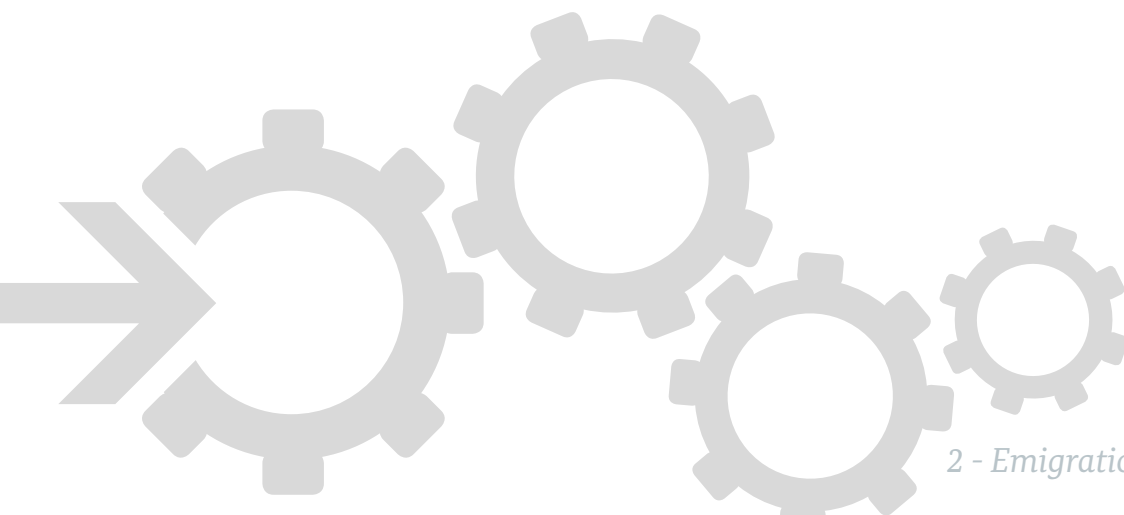


family reunion (Gutekunst 2015) and irregular migration (de Haas 2007a), where social networks have played a strongly facilitating role in reducing the costs and risks of migrating. However, although they have not stopped migration, policy restrictions have made access to migration opportunities more selective. For instance, in Germany, since the German ban on recruitment and the introduction of visa requirements in the mid-1970s, marriage migration has become the most important legal pathway for Moroccans to migrate to Germany – as has been the case for other destinations. The 2007 introduction of a German-language requirement for marriage migrants favours migrants who are relatively well educated and have access to some financial resources (Gutekunst 2015).

Policy restrictions have also stimulated the geographical diversification of Moroccan emigration away from the traditional destinations of France, the Netherlands, Belgium and Germany towards Spain and Italy, and North America, although growing labour demand in southern Europe was also an important factor in explaining this. Notwithstanding this diversification, Moroccan migrants today remain concentrated in a relatively limited number of destination countries such as France, Spain and Italy. Such concentration also occurs at the regional level within destination

countries, with the lion's share of Moroccan emigrants living in regions such as France's (former) northern mining area and south-western agricultural areas, Germany's (former) coal mining and steel industry areas around the Ruhr and Frankfurt, the Randstad area in the Netherlands, the Brussels area in Belgium, Quebec in Canada, Catalonia and Andalusia in Spain and the north of Italy (Berriane 2014b).

Also within Morocco, particular regions tend to 'specialise' in migration towards specific destinations. Migration to north-western European countries such as Germany and the Netherlands mainly originates from rural, Berber-speaking areas in the northern Rif. New emigration to Italy and Spain since the 1980s has on the other hand emerged from regions that used to predominantly be associated with internal migration to big cities (Bencherifa 1996), such as the region around Khenifra and Khouribga. This 'specialisation' of origin areas on migration to particular destinations in Europe is also replicated on a smaller scale: within the Rif for instance, migrants from the towns Kbdana, Bni Sidel and Bni Oulichek have migrated to Germany, while those from other towns in the same region such as Al Hoceima have predominantly settled in the Netherlands (Berriane 2014b).



3 Immigration to and settlement in Morocco

3.1 African immigration

It is largely a myth that migration to and settlement in Morocco is a new phenomenon. Another myth is that most sub-Saharan Africans in Morocco are 'in transit' to Europe and/or illegally residing in Morocco. Immigration to Morocco goes back a long time. While in the colonial period (1912-1956) many French and Spanish settled in Morocco, following independence the country continued to attract workers, students and pilgrims in modest, but significant numbers. As part of its African policy, the Moroccan Government has given scholarships to students from (mainly francophone) African countries such as the Democratic Republic of the Congo, Senegal and Mali (Berriane 2015). Although most of them leave after graduating, some have stayed to work. These migrations are not new but rooted in much older patterns of pre-colonial trans-Saharan mobility and connectivity through conquest, trade and pilgrimage, as well as through the trans-Saharan slave trade (Berriane 2016; Berriane, de Haas and Natter 2015; Kosansky 2011).

However, since the mid-1990s Morocco has consolidated its position as a destination country for migrants from sub-Saharan Africa and also Europe. Although this immigration is still modest compared to the large-scale nature of Moroccan emigration, this is a significant shift from the past, when settlement was rather limited. Whereas a few decades ago, the idea of Morocco as an immigration country would have seemed unimaginable to most Moroccans, the reality has played out differently. An increasing number of migrants from West Africa, the Democratic Republic of the Congo, and other African countries travel to Morocco on visas to pursue studies and embark on professional careers. West African and, more recently, some Philippine women migrate to Morocco as domestic servants and nannies for wealthier Moroccan households, and there is also a modest, but growing presence of Chinese traders in Moroccan cities.

The stakeholder interviews also indicated that the establishment of sub-Saharan African migrant communities in certain neighbourhoods of big cities (such as Takadoum in Rabat) and their deployment in particular economic sectors (such as call centre and construction industries), their increasing involvement in entrepreneurial activities (such as hairdressing and trade in 'African products') and the establishment of a religious infrastructure (through a revival

of existing Catholic churches and an increasing number of Pentecostal and other Protestant churches) may start to attract increasing numbers of Africans who migrate to Morocco as a destination. This is consistent with migration network and migration systems theories, which argue that, once a certain number of migrants have settled at the destination, this can give migration processes their own momentum, as the presence of migrant communities and the emergence of social, economic and cultural institutions encourage more migration to the same destination (see Castles, de Haas and Miller 2014).

This seems to be partly related to increasing Moroccan investment in West African and other countries on the continent, and the development of Casablanca Mohammed V airport as a pan-African air hub. Such investments and connections reinforce links with African countries and its populations, which can also result in more mobility and, eventually, migration. For instance, Royal Air Maroc has recruited airline personnel in Senegal and Mali, and is flying to more and more African destinations; Casablanca is also currently the fourth busiest African airport. Morocco's positioning as a regional leader not only encourages mobility but is also likely to limit the extent to which the Moroccan Government is willing to apprehend and deport undocumented immigrants from citizens of African countries seen as strategic allies.

While the Moroccan state has encouraged sub-Saharan student migration since the 1970s by providing scholarships, numbers have been rising rapidly over the past decade to reach more than 8,500 sub-Saharan students enrolled in Moroccan higher education in 2013-2014. While sub-Saharan students often see their stay in Morocco as part of a long-term plan to work or pursue studies further afield, a significant proportion end up staying in Morocco to work, for instance in the French-language press or the telecommunication sector (see also Berriane 2015). Besides workers and students, the growing African immigrant population in Morocco also includes asylum seekers and refugees fleeing conflict and oppression in their origin countries.

In the 2000s, most refugees came from African countries, but in recent years a growing number of Syrian refugees have found their way to Morocco. Particularly since 2000, significant numbers of African migrants have used Morocco as a staging ground before attempting to enter Europe,

and have thus joined Moroccans in their attempts to cross the Mediterranean in boats or hidden in trucks and vans – a continued phenomenon ever since southern European countries introduced visas in 1991. However, the most significant recent trend is that, despite regular experiences of racism, discrimination on the labour market and political violence, an increasing number of both documented and undocumented migrants in Morocco seem to be settling permanently.

3.2 *New European immigration*

In addition, an increasing number of Europeans are settling in Morocco as workers, entrepreneurs, or retirees (Berriane et al. 2013; Therrien and Pellegrini 2015). Although these groups are – rather inaccurately – often not seen as ‘immigrants’ (a label more commonly preserved for less privileged African immigrants), nearly 50,000 French migrants live in Morocco, making it the largest migrant community in the country, well ahead of sub-Saharan immigrant communities (Therrien and Pellegrini 2015). While some come as retirees, others work or set up various sorts of businesses, including riads, luxurious traditional style Moroccan guesthouses. One interview-based study among French immigrants showed that social relations between French migrants and Moroccans can be problematic both in private and professional contexts, and levels of integration are often limited. Adaptation and integration strategies of migrants range from living ‘with’ or ‘among’ Moroccans to living ‘within a bubble’ or ‘in parallel’ (Therrien and Pellegrini 2015). However, such limited integration is not seen as a problem, whereas the growing presence of sub-Saharan migrants and refugees, who generally show greater degrees of integration, often is.

Yet European immigrants are not necessarily all high-skilled workers or investors. The number of European labour immigrants, particularly unemployed youth from Spain, has increased since the onset of the global economic crisis in 2008. They are hired by private companies or work in sectors such as the call centre industry, which is being outsourced from European countries to Morocco. The stakeholder interviews confirmed that call centres employ both African and European immigrants. African immigrants are often valued above native Moroccans because of their good French language skills. Europeans working in Morocco sometimes also include the second generation of the Moroccan diaspora. For instance, several

young Dutch Moroccans work for Dutch call centres based in Morocco. Using their Dutch language skills, this gives them an opportunity to work and to ‘try out’ living in Morocco for a number of months or years. Salaries would come to around €600-800 per month.

The latter example shows that it is difficult to draw a sharp line between ‘return migration’ and European immigration. Stakeholder interviews indicated that a significant number of second-generation ‘Moroccans’ are interested in investing in Morocco. However, the majority of such potential investors are European nationals and are often either born in Europe or came to Europe as children. They have generally been successful in terms of economic and cultural integration in Europe, and during their ‘return’ to Morocco they often face obstacles such as limited or no knowledge of French and Arabic, and a lack of familiarity with Moroccan society, bureaucracy and business culture, which is not entirely dissimilar to the experience of European immigrants without Moroccan heritage.

3.3 *Morocco’s changing immigration policies*

With the growing presence of immigrants, Moroccan society is confronted with new social and legal questions typical for immigration countries that do not always fit with Morocco’s self-image as a classic emigration country. This has expressed itself in rather ambivalent attitudes in Moroccan society that are somewhat reminiscent of, although not entirely comparable to, the initial ‘state of denial’ and, later, various stages of political and cultural accommodation to new social migration realities typically experienced in countries such as Germany and the Netherlands in the 1960s and 1970s.

On the one hand, in Moroccan society and politics we sometimes see typical responses to growing immigration in the form of xenophobia, fears of migrants ‘stealing’ jobs and cultural alienation. On the other hand, a vibrant civil society has evolved around migrants’ associations, religious institutions and Moroccan human rights NGOs that is defending migrants’ rights to residence, work, health care and education. Alongside providing everyday support and assistance to refugees and migrants, these groups have also played a major role in making racism, xenophobia and discrimination public issues (both domestically

and internationally) and, hence, an increasing concern for the Moroccan state, including in terms of its human rights record and image abroad (see also Ustubici 2016).

In the 2000s, the Moroccan Government initially adopted a restrictive, security-based approach, largely emulating dominant European approaches and accompanying discourses. This was manifested in law 02-03 of 2003 (Natter 2013) as well as in frequent raids and repeated illegal expulsions of migrants, including refugees, to Algeria and Mauritania. In response to increasing immigration, growing criticism from Morocco's civil society of the abuse of migrants' rights, and the country's own geopolitical interest in maintaining good ties with African states (Cherti and Collyer 2015; de Haas 2014), in September 2013 King Mohammed VI announced a new, more strongly human-rights-based migration policy. The centrepiece of this reform was a regularisation programme that initially granted legal status to nearly 18,000 irregular (mainly African but also European) refugees and migrants between 1 January and 31 December 2014. In 2015, the new National Strategy on Immigration and Asylum was enacted, which officially aims to stimulate the integration of migrants regularised in 2014, and three new laws on migration, asylum, and human trafficking were drafted to replace the 2003 law (Cherti and Collyer 2015). For its part, the 'Stratégie Nationale des Marocains du Monde' (national strategy on Moroccans around the world), which was also enacted in 2015, aims to strengthen ties with the Moroccan

diaspora abroad and to facilitate the reintegration of Moroccan return migrants. Although it remains to be seen to what extent and how these policies will be implemented, it shows that there have been significant changes on the official policy and legal level.

According to the 2014 census, 86,206 foreigners were living in Morocco¹⁴, against 51,400 in 2004. However, since many European, sub-Saharan and other immigrants are undocumented and/or have not registered with the Moroccan authorities, real numbers are likely to be significantly higher. While estimates of the number of irregular sub-Saharan migrants in Morocco have varied over the years from 10,000 to 15,000 (Cherti and Collyer 2015), the number of applications for regularisation (27,332) indicates that real numbers may be significantly larger. A significant share of migrants in Morocco have lapsed into irregularity and become undocumented. Students, for example, may remain after completing their studies and then become unable to access formal employment, pushing them into illegal work (Cherti and Collyer 2015). Furthermore, not everyone has become 'visible' through the regularisation, since some may not want to stay in Morocco and would prefer instead to continue on to Europe. From the 27,332 regularisation applications, 17,916 have been successful, and they originated from 116 different countries. The top five nationalities were Senegalese (6600), Syrian (5250), Nigerian (2380), Cameroonian (1410) and Guinean (1408) (Cherti and Collyer 2015).

14 Recensement Général de la Population et de l'Habitat 2014, (2014). Note sur les premiers résultats du Recensement Général de la Population et de l'Habitat 2014. [online] Available at: http://rgph2014.hcp.ma/Note-sur-les-premiers-resultats-du-Recensement-General-de-la-Population-et-de-l-Habitat-2014_a369.html [Accessed on 6 March 2016].

4

Migration transitions: Morocco as a destination country?

4.1 A Moroccan migration transition?

To understand how Moroccan migration may evolve in future it seems useful to analyse whether, in the medium to long term, Morocco has declining emigration potential and whether the country may evolve into a destination country as part of a general 'migration transition', as has happened in the past in southern Europe, and, particularly since 2000, in Turkey. For this exercise, it is useful to use the analytical framework of migration transition theory (de Haas 2010; Skeldon 2012; Zelinsky 1971). Migration transition theory sees migration as an *intrinsic* part of broader processes of development, rather than a sign of development failure or the 'antithesis' of development. Transition theory argues that development processes are initially associated with *increasing* levels of migration, but it also stresses that this relationship is fundamentally *non-linear*, contrary to the predictions of popular yet inaccurate and misleading push-pull theories.

Historical experiences have shown development in poor societies tends to increase emigration (see also Skeldon 1997; Tapinos 1990). This is partly because people need resources and aspirations to migrate. It seems no coincidence that important emigration countries such as Mexico, Morocco and the Philippines are not among the poorest countries. Structural factors explaining why development generally increases overall levels of mobility and migration include urbanisation and the concomitant shift of economic activities away from agriculture to the industrial and service sectors. While infrastructure improvements facilitate movement, increasing levels of education, occupational specialisation and an associated rise in the structural complexity of labour markets also increase the need for people to migrate or otherwise be mobile (such as through commuting) in order to study and to find jobs and cultural environments that match their qualifications and aspirations.

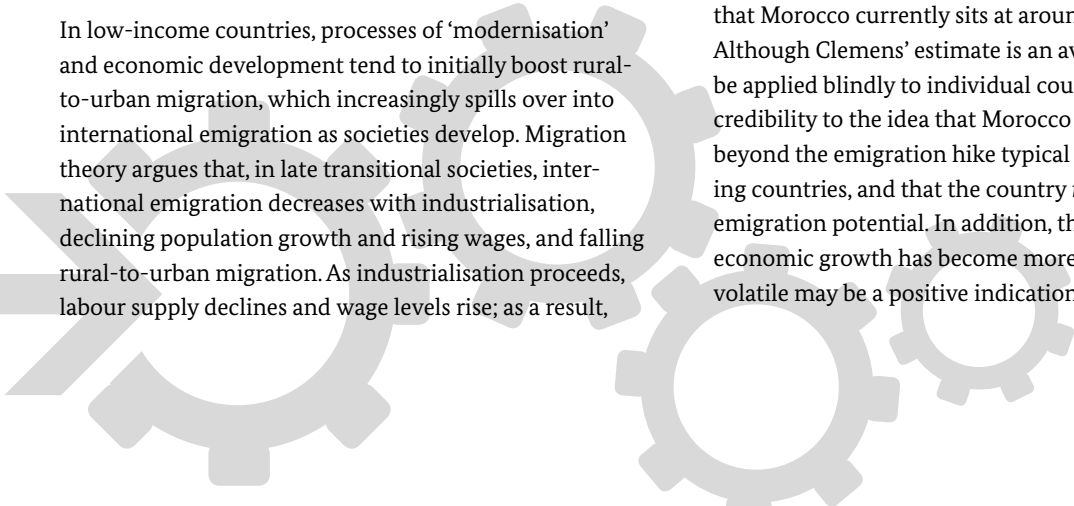
In low-income countries, processes of 'modernisation' and economic development tend to initially boost rural-to-urban migration, which increasingly spills over into international emigration as societies develop. Migration theory argues that, in late transitional societies, international emigration decreases with industrialisation, declining population growth and rising wages, and falling rural-to-urban migration. As industrialisation proceeds, labour supply declines and wage levels rise; as a result,

emigration falls and immigration increases, which transforms countries into net immigration societies. Indeed, historical and contemporary experiences support the idea that countries go through such migration transitions as part of broader development processes. For instance, in the late nineteenth and early twentieth centuries, the relatively developed north-western European nations initially dominated migration to North America, with lesser developed eastern and southern European nations following suit only later (Hatton and Williamson 1998; Massey 2000). Recent studies based on World Bank data on the migration stocks of every country in the world confirmed that countries with medium levels of development generally have the highest emigration rates (Clemens 2014; de Haas 2010).

With regard to the possible future evolution of Moroccan migration, the crucial question is therefore related to the general levels of economic and human development in Morocco: can we expect the 'Turkish' scenario of declining emigration and growing immigration to play out in Morocco in the short to medium term? The second crucial question is whether there is evidence that migration aspirations may be changing within Moroccan society as a possible result of growing opportunities in Morocco and perhaps the perception that Europe no longer offers the opportunities it did before the GEC in terms of work in the formal and informal sectors.

4.2 Development trends and possible migration implications

With regard to the first question, based on his analysis of global migrant stock data from the World Bank, Clemens (2014) found that for GDP per capita levels of below US\$6,000–8,000 (adjusted for purchasing power parity, at United States prices), countries that get wealthier experience increasing emigration. The figures in Annex 2 suggest that Morocco currently sits at around the US\$7,000 mark. Although Clemens' estimate is an average which cannot be applied blindly to individual countries, this gives some credibility to the idea that Morocco *might* have moved beyond the emigration hike typical of rapidly developing countries, and that the country *may* have decreasing emigration potential. In addition, the fact that since 2000 economic growth has become more stable and much less volatile may be a positive indication.



Yet we have to look beyond crude economic indicators to understand the fundamental process of social and economic transformation Morocco has witnessed since the 1960s guest-worker era (see Annex 2 for figures on the evolution of key development indicators). First of all, Morocco has undergone an intense and rapid urbanisation process. While in 1960 about 30% of the population lived in urban areas, this share had grown to 60% by 2014. This partly reflects internal migration from rural areas to large towns and cities, but also the conversion of rural communities (*communautes rurales*) into urban municipalities (*municipalites*), a process that Berriane (1996) aptly called a general process of ‘micro-urbanisation’ in previously rural and agrarian areas.

This has also coincided with a diversification of rural livelihoods: a shrinking number of rural households are living primarily from agriculture, and increasingly incomes are being supplemented by work in the service sector, industry and construction, and remittances received from internal and international migrants. In 2014, agriculture accounted for only 13% of Morocco’s GDP. In the southern Moroccan Todgha valley, for instance, it was estimated that 86% of all rural households had non-agrarian income and that agriculture accounted only for 13% of cash income (see de Haas 2006). Although the Todgha is a high-emigration region, it is experiencing a rate of de-agrarianisation typical of many rural areas. This should also be a reason for scepticism vis-à-vis rural development plans which are one-sidedly focused on agricultural development.

This rural–urban transition has coincided with a rather spectacular demographic transition. Morocco has seen one of the fastest declines in fertility rates in the Arab world, with figures plunging from 7.1 in 1960 to just above 2 in the mid-2010s. According to the 2014 census, national, rural and urban fertility rates were 2.2, 2.6 and 2.0, respectively.¹⁵ Moreover, between 1960 and 2014 life expectancy increased from 48 to 73 (see figures in Annex 2). This means that the Moroccan population, which is still rather young, is growing more slowly and will start to age in the coming decades. Coinciding with these processes, primary school enrolment has become near universal and secondary school enrolment has also drastically increased both for men and women. Although they are still lagging

behind, rural areas have been catching up with urban areas in terms of school enrolment. Illiteracy is still rather high in Morocco considering its levels of economic development, but rapidly decreasing. According to the 2014 census, illiteracy stood at 32%, with marked differences between men (22.1%) and women (42.9%), and between rural (47.7%) and urban (22.2%) areas.¹⁶

Under a scenario of continued economic growth and political stability in the future, the slowing down of population growth could indeed imply that emigration to Europe will further decrease and immigration from sub-Saharan Africa will further increase. However, this is dependent on future economic opportunities and political stability in Morocco, which are impossible to predict. We should therefore avoid jumping to the conclusion that Morocco’s emigration potential will decrease in the future. Moreover, such general development indicators are national averages that easily conceal structural problems of inequality and unemployment and considerable differences in development levels between Moroccan regions. According to the 2014 census, female and male unemployment is still high at 12.2% and 28.3% respectively.¹⁷ Unemployment is particularly high among urban populations and skilled people. Increasing skilled unemployment has already translated into increasing skilled emigration to North America, and may grow further with the generally increased levels of education of the Moroccan population if the rising numbers of skilled young people are not matched by demand for skilled labour. Another problem relates to concerns about the quality of public education in Morocco and the mismatch between the limited practical, language and analytical skills of many Moroccan graduates and the types of skills demanded by many employers, which seems to partly explain why they sometimes prefer to hire foreign employees.

Despite significant positive trends in economic growth and human development, which may lead to decreasing emigration and increasing immigration in the medium term, the economic gap with destination countries is still huge. Even adjusted for purchasing power parity, GDP per

16 Source: Haut Commissariat au Plan du Maroc.

17 Source: Haut Commissariat au Plan du Maroc. It is not entirely clear what explains higher male unemployment, although relevant factors are likely to include higher levels of education among men (unemployment is higher among the skilled) and lower levels of labour market participation among women (since they are less likely or may not consider looking for work).

15 Source: Haut Commissariat au Plan du Maroc.

capita levels in Germany and Spain are 15.7 and 9.9 times higher than in Morocco. GDP per capita levels in Turkey, which went through a migration transition in the 2000s, are 3.5 times those of Morocco. This should be a warning against overly optimistic scenarios. Although Morocco's emigration potential may decrease, it is still likely to be significant for the years to come.

4.3 Varying and changing regional migration cultures

Future development trends may affect emigration patterns differently across Moroccan regions. While economically thriving regions might have declining emigration potential (at least for lower-skilled emigration), more marginalised areas may still have considerable emigration potential. While economic and urban growth in Morocco has generally concentrated in the urban clusters around Casablanca and Rabat, recently new urban regions have emerged as important growth poles, in particular the northern region around Tangier and to a certain extent also around Marrakesh, Agadir and Fez-Meknes. These regions have increasingly attracted domestic and foreign investments, and have therefore emerged as important destinations for Moroccan and foreign investors as well as migrants.

Recent research based on the EUMAGINE project¹⁸ on migration aspirations has indicated that, particularly in relatively prosperous areas and urban regions, building a future in Morocco is an increasingly attractive alternative to emigration, as a partial consequence of the difficulties faced by Moroccan migrants abroad and growing opportunities in some economic sectors in Morocco (Aderghal

2014; Berriane 2014a; Jolivet 2015). Migration aspirations seem to be stagnating or decreasing in the economically thriving regions, such as around Tangier. This is partly because regional economic opportunities have been improving, but presumably also because these regions have a long history of Europe-bound migration, through which people have a better knowledge of changing economic fortunes in European destinations (Jolivet 2015). Future research is necessary to show whether this also applies to other 'traditional' zones of intensive out-migration such as the Sous valley and southern oases.

In more marginal and impoverished regions, where out-migration has mainly been internal, and which have so far experienced low emigration precisely because of their isolation and high incidence of poverty, improved infrastructure, increasing levels of education and modest income growth are likely to continue to fuel people's aspirations (and capabilities) to emigrate at least in the short to medium term. Indeed, comparative survey data from the EUMAGINE show that international emigration aspirations in isolated villages in the eastern High Atlas around Tounfite and in the area around Oulmes are higher than in more prosperous parts and urban areas such as Tangier, which may have declining emigration potential (Jolivet 2015). More generally, the EUMAGINE survey shows that while migrants are aware of the economic crisis in Europe and problems related to racism, this does not necessarily undermine migration aspirations altogether, and emigration is still considered by many as a means to improve individual wellbeing and the economic situation of the family (Aderghal 2014; Berriane 2014a).

18. In Morocco, the EUMAGINE project consisted of a survey of 2,000 young non-migrants and 80 in-depth interviews conducted in 2010 and 2011 in four rural and urban regions. The project also conducted similar surveys and interviews in Senegal, Turkey and Ukraine.

5 Development impacts and economic potentials of migration

5.1 The impacts of financial and social remittances

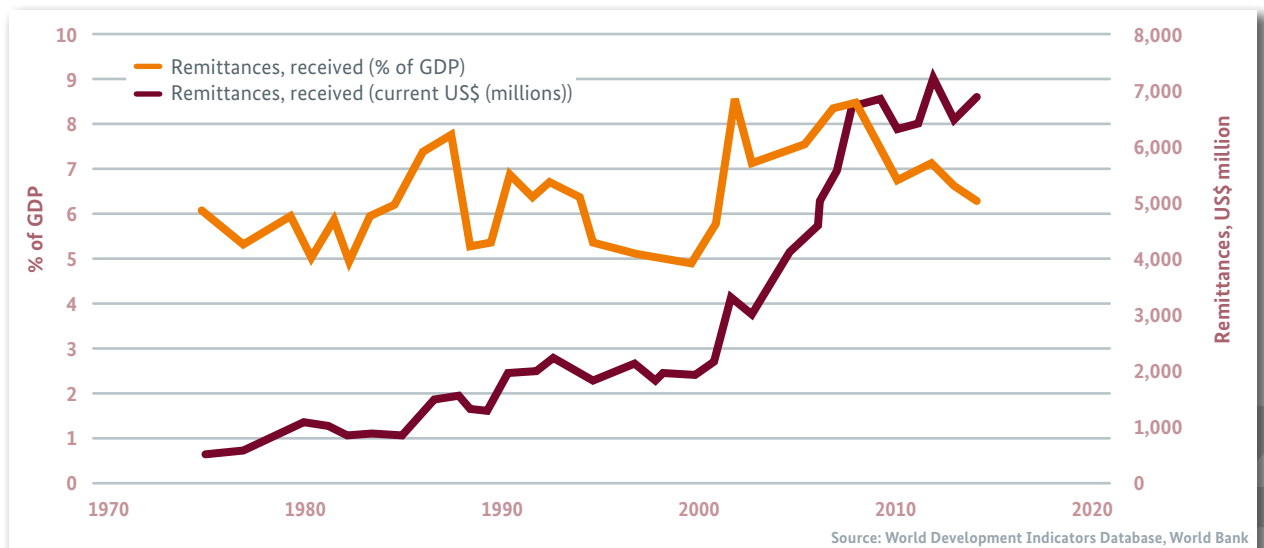
Since the 1960s, the Moroccan Government has encouraged emigration, for instance by signing recruitment agreements, because emigration and remittances were expected to reduce poverty, unemployment and discontent, and thus function as a political safety valve (De Mas 1978). Until the 1990s, the Government attempted to maintain tight control of Moroccans living in Europe and discouraged their integration into receiving societies, including naturalisation. Moroccan migrants were also discouraged from joining trade unions or political parties and, hence, from forming an opposition force from abroad.

However, over the 1990s, with the emergence of a second generation, there was a growing consciousness within the Moroccan Government that these policies alienated migrants and, particularly, the second and third generation, and that this alienation may endanger vital remittance transfers (de Haas 2007b; Sahraoui 2015). For instance, Moroccan migrants in France created many organisations which challenged French and Moroccan citizenship models by developing transnational political practices (Dumont 2008). Other migrant organisations became very active in setting up development projects in Morocco that introduced innovative participatory methods, which could be interpreted as a tacit critique of more authoritarian and top-down government approaches towards rural development (Lacroix 2005).

In this context, the Moroccan Government changed course by adopting a less authoritarian approach, reaching out to Moroccan emigrants, facilitating their holiday returns (for instance by cracking down on excessive extortion practices by corrupt border officials) and developing economic and fiscal policies to stimulate remittances (de Haas and Plug 2006; de Haas 2007b). In a rather striking reversal of views, integration of migrants is no longer officially seen as a danger, but as a potentially beneficial process which enables migrants to send more money home and to invest (Iskander 2010). Increasing civil liberties gave migrants more freedom to establish Berber, cultural and 'hometown' associations (see also Lacroix 2005). These policies seem to have been relatively successful in stimulating migrants' holiday visits and remittances.

Alongside accelerating emigration over the 1990s and 2000s and a fast increase in annual holiday returns, these policies seem to have contributed to a major surge in remittances to about US\$8.5 billion in 2007 equal to approx. eight per cent of Morocco's gross national product (GDP), and about six times the amount of official development assistance (see Figure 8). Since the GEC, remittances have been stagnating, but remain an important source of income in migrant sending areas as well as a vital source of foreign currency. The actual amount of remittances is higher because migrants also remit money through informal channels and migrants also bring many goods, particularly during summer holidays.

FIGURE 8. REMITTANCES TO MOROCCO



However, in addition to remitting money, migrants also effect social, cultural and political change in Morocco through ‘social remittances’ (a concept coined by Levitt 1998). Although such effects are difficult, if not impossible, to measure statistically, they are no less important. For instance, there is evidence that Morocco’s spectacular fertility transition mentioned above was partly stimulated by social remittances in the form of a transfer of small family norms by Moroccan migrants living in Europe (Beine, Docquier and Schiff 2013; Fargues 2006). Most observers also agree that the Moroccan state’s vital macro-economic interest in financial remittances has increased the political leverage of the Moroccan diaspora (de Haas 2007b; Iskander 2010; Lacroix 2005; Sahraoui 2015). The vital interest that the Moroccan emigrant population represents has pushed the Moroccan state into significant reforms to ensure that this emerging diaspora continues to bring economic, social and political benefits to the state (Sahraoui 2015).

Migration and remittances are an essential part of the economic strategies of Moroccan households, particularly in areas of intense out-migration such as the Rif, the Tadla, the Sous and the southern oases. Numerous field studies conducted in origin areas have shown that migration and remittances have improved living conditions, income, and education, and spurred economic activity through investments, in housing, agriculture and other businesses, from which non-migrants indirectly benefit through employment creation. Through household relocation from rural to urban areas and, increasingly, urban-based real estate and business investments, international migrant households simultaneously capitalise on and actively contribute to the above-mentioned process of micro-urbanisation (Berriane 1996): accelerated urban growth and the concentration of economic activities in urban centres mostly located inside or nearby migrant-sending areas. This has transformed several of these emigration regions into relatively prosperous areas that now attract internal migrants from even poorer and more marginal areas (for reviews of empirical evidence, see Bencherifa 1993; Berriane and Aderghal 2009; de Haas 2009).

Statistical studies show that remittances improve household welfare and decrease poverty (Bouoiyour and Miftah 2015b), and that they tend to facilitate children’s education and decrease their labour participation (Bouoiyour and Miftah 2016). The impact of (until recently predomi-

nantly male) labour migration on gender norms is more ambiguous. Remittances help fund the construction of houses destined for nuclear families, which generally improves the wellbeing of migrants’ spouses who are no longer obliged to live with their in-laws. Remittances also enable girls to go to school. However, one study suggested that boys benefit more than girls, particularly in male-headed households (Bouoiyour and Miftah 2015a). However, another study suggested that particularly in female-headed households, remittances may contribute to closing the gender gap in primary and secondary education (de Haas 2003). More in general, processes of women’s emancipation in terms of schooling, work and overall social liberties seem not so much the result of migration, but instead rather reflect *general* processes of cultural and legal change in Morocco (De Haas and Van Rooij 2010).

5.2 Return migration and development: factors of success and failure

Despite the unquestionable contribution of migration to improving the material wellbeing of families and communities of origin, there is also ample evidence that the development potential of international migration for Moroccan sending communities is far from fully realised. Back in the 1990s, Kagermeier (1997, 1999) observed that many return migrants are not successful and that many investment projects fail. He questioned the dominant image of the successful return migrant, and argued that the high visibility of their often urban-based material investments may create a bias obscuring the difficult life of many returnees and their frequent failure to realise their initial dream of setting up their own business. The fact that Moroccans have one of the lowest tendencies to return of all immigrant groups in Europe (see also Fadloulah, Berrada and Khachani 2000: 56) suggests that return and investment aspirations of Moroccan migrants are frequently thwarted by rather unfavourable investment conditions.

The most commonly mentioned investment obstacles during the stakeholder interviews included government bureaucracy and a lack of transparency and speed with regard to administrative procedures. Other frequently mentioned obstacles included the risk-averse attitudes of Moroccan banks and the concomitant difficulty in obtaining loans for small and medium-sized enterprises, as well as a lack of legal security. One example of the latter was the

disheartening experience of a Dutch-Moroccan migrant who established a factory producing *stropwafels* (syrup waffles, a typical Dutch delicacy), which also featured in a report on Dutch television.¹⁹ This enterprise was initially a resounding success. However, after returning from a business trip, he found his factory had been seized and locked by the owner of the building. The migrant entrepreneur won the initial court case, but the landlord appealed to a higher court. The legal struggle had been going on for over two years at the time of the report, and during all this time his factory could not be used. This forced him to return to the Netherlands to take up a regular job in order to sustain his family.

The stakeholder interviews made clear that in order to understand the widely diverging experiences and development potential and implications of return migration, it is useful to make a distinction between four categories of returnees:

1 Involuntary return migrants. These are formerly undocumented migrants who were deported back to Morocco, generally from Spain and Italy. Many suffer from significant psychosocial problems because of a history of marginalisation in Europe and a lack of acceptance and bitterness with regard to their forced return. In many cases, their families only accept them back reluctantly, and the return migrants themselves feel scorned as social outcasts who have failed in their migration adventure. Many aspire to remigrate. NGOs working with migrants stress that this category needs support for their psychosocial (re)integration in Morocco, and suggest that forced return migrants generally have low aspirations, capacities and chances of successfully starting an enterprise because of their general lack of education and skills, traumas suffered and their continued emigration aspirations. One stakeholder described a project with deported migrants as a 'total failure', partly because most of the participants eventually remigrated to Europe. In other words, it seems a contradiction in terms and wishful thinking to associate *forced* return with development. From the migrants' perspective, it was the act of migrating that

represented opportunities for personal advancement and development. Their return is seen as failure, and it is unconceivable that this category can be forced to reintegrate, because they are generally reluctant to do so and often still aspire to remigrate.

2 Low-skilled voluntary return migrants. This category consists of two groups:

- (i) *Earlier return migrants from the guest-worker generation* who decided not to reunify their family in countries like the Netherlands, Belgium and Germany in the 1970s-1990s. This group of return migrants sometimes received return premiums from destination country governments such as the Netherlands. These returnees have made limited investments in housing and small enterprises, but often have income from pensions or benefits earned in Europe. They sometimes adopt strategies of pendulum migration in cases where their spouse and children live in Europe (see above).
- (ii) *Recent returnees*, particularly those who came back from Italy and Spain after economic conditions worsened following the GEC, causing many migrants to lose their jobs. These include documented and undocumented workers. Several destination country governments and the EU have provided limited funds to assist migrants in returning and provide some support in setting up small enterprises. Amounts of funding provided are generally in the range of €1,000-€2,000 not including practical support in preparing for their return. Only small quantities are paid out in cash; most money goes to purchasing items and equipment for investment. Typical investments include grocery stores, street vending, tailoring, crafts, small transport companies using three-wheel cargo mopeds, taxi licences and livestock.

The experiences of these return migrants are rather mixed. Many returnees face difficulties upon their return. Although their situation is not as dismal as that of the deported migrants, they have problems preserving their dignity. Sometimes families are rather reluctant to have them back, as they cannot accept or believe the story of their failure in Europe. The family often does not welcome the return, partly because they had put all their hopes and money in the emigration of the return-

19 20 jaar EenVandaag: terug naar Marokko, 1 Vandaag, (2013), television programme, Nederland 1, The Netherlands, 22 August. Available at: http://20jaareenvandaag.eenvandaag.nl/hogtepunten/best-off/46883/20_jaar_eenvandaag_terug_naar_marokko [Accessed 4 April 2016].

ing relative, for instance selling all their land, and they may blame the latter for having failed to deliver. Many migrants live in a situation of general personal failure and psychosocial problems, and often find themselves on the margins of society both in Europe and back in Morocco. They often do not speak Italian or Spanish even after up to 20 years of residence, and have carried out various forms of precarious work.

Returnees frequently suffer from a lack of social freedom. Social pressure is often experienced as suffocating. They did not actively choose to return, but were faced with a lack of opportunities and marginalisation in Europe, and this also explains why investment plans often fail to materialise. For the children of return migrants, one stakeholder described the situation as 'catastrophic'. They have huge problems in terms of adaptation, and they do often not speak Moroccan languages, and more in general they resent their situation. They would need special language and other courses to support their (re)integration, but most of them lack skills and motivation, and generally aspire to remigrate.

Returnees who succeed in setting up small enterprises are seen to possess an entrepreneurial spirit and enjoy favourable conditions back home, such as having family members who already live in a big city. Such successful small entrepreneurs include a significant number of women, who are often described as having a higher sense of responsibility and obligation towards their family. For this category, small-scale support programs can be effective. Migrants who succeed upon return are generally those who start small enterprises like street vending, sewing, crafts and small transport companies using three-wheel cargo scooters.

3 High-skilled voluntary return migrants generally include Moroccans from middle-class families who studied and/or worked abroad for a while before returning. They often set out with the explicit intention of returning after they have acquired sufficient skills and higher education degrees and they have saved enough money in order to return. Some of these take up jobs in government, education or the private sector, others start their own enterprises, ranging from software companies, pharmacies and private clinics to the import and distribution of goods such as solar panels. This is a high-potential category in terms of

economic contributions and chances of success: after a relatively short stay abroad they are still largely familiar with Moroccan society; they also possess the skills and money to invest. However, this group also faces problems readapting to a different business climate, government bureaucracy and the fact that Morocco has changed during the years abroad. Therefore, support in preparing for their return and guidance in establishing themselves and making investments is seen as desirable.

4 Second-generation 'quasi-returnees' consist of the economically successful children of the guest-worker generation who have developed return and investment plans, sometimes in partial reaction to racism and islamophobia in Europe, but also in search of business opportunities. As this group grew up in Europe and cannot be considered genuine returnees in a migratory sense, their problems upon return partially resemble those of European investors without Moroccan heritage. The biggest obstacles to successful integration and investments are a lack of language skills in Arabic and French, a general lack of knowledge of and familiarity with Moroccan society and, hence, ill-fated and unrealistic business plans which reflect a lack of knowledge of the Moroccan market and consumers' desires. Investment projects include IT firms, private schools, fitness centres, car rental, trade (import/export), transport, catering, travel agencies, insurance, agriculture and livestock. Despite initial enthusiasm, many such aspiring investors end up cancelling their plans, partly because their business ideas turn out to be unrealistic and partly because once in Morocco, they discover how 'European' they have become. Consequently, many grow homesick and eventually go back to Europe. However, others do succeed. For this group, extensive support in developing business plans and market studies and guidance in how to deal with bureaucratic hurdles can pay off. Nevertheless, stakeholders indicated that support programs for entrepreneurs should require that migrants themselves take the initiative and provide their own investment money.

This analysis shows that there is no such person as the 'average return migrant', and that these different categories also require different approaches in terms of supporting the wellbeing of returnees and their social and economic integration in Morocco. Efforts by governments and NGOs

to support returnees should therefore be tailored to the needs of the particular migrant groups.

The analysis also shows that it is generally unrealistic to expect socially and economically marginalised 'failed' return migrants to make any significant contribution to 'development' in Morocco, let alone to expect that any project to support their reintegration will trigger economic development. On the contrary, their forced or 'reluctant voluntary' return increases their feeling of marginalisation, and efforts to support such migrants should focus on giving them psychosocial assistance instead of the one-sided emphasis on *economic* support, which is the usual focus of governments. Stakeholders also argued that funders of return and investment programs have a one-sided focus on maximising the *numbers* of migrants supported through such programs, and that it would be better to select lower numbers of return migrants, so that more resources would be available, boosting the likelihood of successful outcomes.

5.3 Economic and social contributions of migrants and refugees in Morocco

The literature review and stakeholder interviews provided ample indications that sub-Saharan migrants and refugees contribute to the Moroccan economy and society, for instance by alleviating labour shortages in several sectors such as construction, trade, domestic work, nursing and other forms of personal care, and various low- and high-skilled services. Confronted with a lack of regular jobs and situations of discrimination, many of the more settled migrants from sub-Saharan Africa develop entrepreneurial activities, ranging from hairdressing, trading in 'African products', bakery and catering. Others opt to receive training in Moroccan vocational training institutions through the Office de la Formation Professionnelle et de la Promotion du Travail (OFPPT). This has recently been made possible by the Moroccan authorities and with financial support from organisations such as the UN Refugee Agency, UNHCR, allowing some refugees and migrants to acquire skills and licences for trades such as car mechanics, auxiliary nursing, carpeting, hairdressing, construction and catering.

Migrants' experiences in Morocco vary widely, ranging from long-term settlement of skilled workers and students to irregular migrants experiencing chronic poverty

and exclusion. Notwithstanding the multiple challenges, over time migrants tend to build social, economic and cultural ties through friendship, study, work, trade, love, marriage, language acquisition and other forms of adaptation and integration (Cherti and Collyer 2015). This challenges stereotypical portrayals of sub-Saharan immigrants as 'transit' or 'trapped' migrants.

Contrary to the perception of migrants and refugees as a drain on Moroccan society, these groups actively contribute to economic growth through work and informal or formal entrepreneurship, despite frequent exploitation and experiences with racism or outright hostility. Stakeholder interviews indicated that not only employers, but also university lecturers, are generally favourably impressed by the skills and motivation of sub-Saharan migrants and refugees, particularly those from Francophone countries. They tend to speak French very well (allegedly better than many Moroccans), many possess higher education degrees, and they are eager to work hard and often to start businesses.

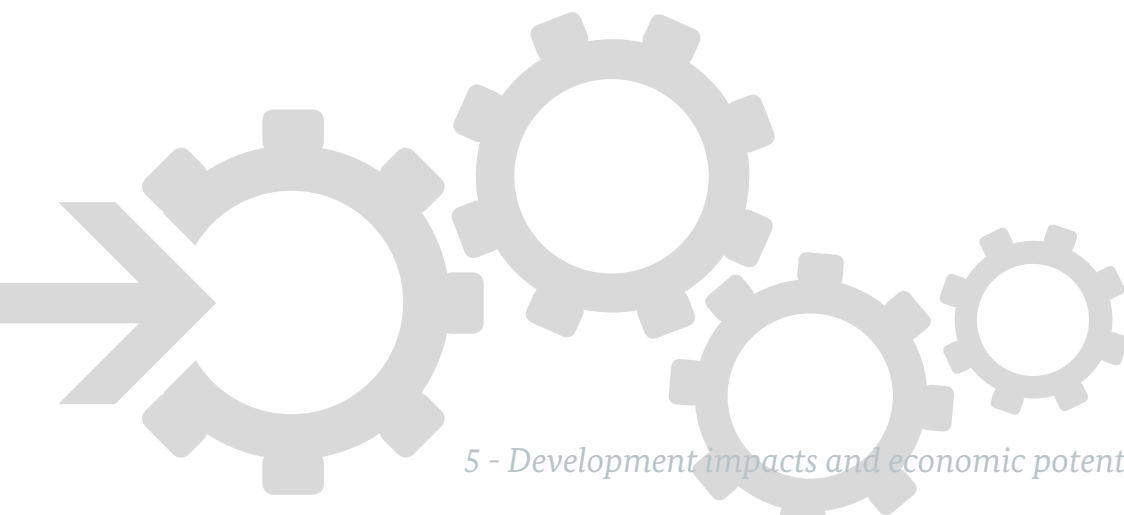
This partly confirms evidence provided by earlier studies. The study by Pickerill (2011) on the various economic activities among the sub-Saharan migrant population in Rabat and Casablanca described the emergence of a nascent underground economy often built around informal migrant labour. Irregular migrants are active in single-employee informal activities such as shining shoes, selling peanuts, washing windows, and providing various other goods and services which are widespread in Morocco. Other sub-Saharan migrants own restaurants or informally produce (home-made) African food to sub-Saharan communities. Recently arrived sub-Saharan migrants often do strenuous work on construction sites, at the time of the study earning about 50 dirham (roughly equivalent to 5 US\$) for a 10-hour work day, only half the average salary of Moroccans. However, some migrants are able to make a career, for instance by establishing their own construction, catering and other businesses, such as the sale of 'African' art and trading between Morocco and other African countries. Despite the difficulties many migrants face, this shows the entrepreneurial spirit many migrants bring and their potential for the Moroccan economy. This also explains why some remain in Morocco after starting a successful business (Pickerill 2011).

Based on in-depth interviews with 50 sub-Saharan migrants (38 men and 12 women) and 19 stakeholder interviews, Cherti and Collyer (2015) further highlighted the mixed experiences of migrants in Morocco. Their research showed that experiences of sub-Saharan refugees and migrants in Morocco range from a secure legal and employment status to a clandestine life characterised by a state of chronic poverty and exclusion. However, even though they typically face considerable difficulties, irregular migrants may still have relatively positive views of their stay in Morocco, particularly when they have fled civil conflict and violence. Because of their precarious legal and economic situation, many migrants are forced to work in the informal sector, often in dangerous and poorly paid jobs in agriculture and construction. Because they accept lower wages, sub-Saharan migrants are now in higher demand in certain sectors, particularly in construction, but also in the call centre industry and in tile and marble factories in large cities (Cherti and Collyer 2015).

Sub-Saharan African migrants and refugees in Morocco are highly organised and there is a migrants' trade union (Collectif des Travailleurs Immigrés du Maroc) which is allied to the Moroccan trade union Organisation Démocratique du Travail (ODT). There has been significant progress with the public authorities becoming more sensitised to the needs of migrants and refugees and a gradual recognition that their rights need to be protected, but there is still a long way to go. There is still no legal framework that explicitly protects the rights of migrant workers. Many practical obstacles exist to integration in the labour market.

For instance, to employ foreign nationals employers must obtain permission from ANAPEC (Agence Nationale de Promotion de l'Emploi et des Compétences), which is difficult because they need to prove that there are no Moroccans qualified for the job. The result is that many migrants become even more vulnerable to exploitation, because they are forced to work without a formal contract or on a series of temporary 'internship contracts', a practice common among call centres. Many migrants work in the construction sector, which one stakeholder described as 'total anarchy'. Labour exploitation means that migrant workers are paid much lower salaries. The normal daily salary in construction is 70-80 dirham (about 7-8 US\$) for Moroccan workers and half that amount for foreigners. Women doing domestic jobs are particularly vulnerable to exploitation.

Because of limited interaction with Moroccans, the economic, social and cultural integration of sub-Saharan migrants remains a challenge. While negative experiences include exploitative employers and landlords and aggressive street gangs, others have established friendships and receive assistance from Moroccans. Yet in their private lives, the level of contact remains more limited – and this social segregation of sub-Saharan migrants is exacerbated by prejudice and stigma (Cherti and Collyer 2015).



6 Conclusion and insights for policy

This report highlights how Morocco evolved into a prominent emigration country. The country has a sizeable diaspora in Europe of more than 3 million people, while smaller Moroccan migrant communities live in North America and Arab states. The global economic crisis of 2008 has led to a slowdown in emigration but relatively few migrants have returned permanently, as they have preferred to stay on the safe European side of the border. Paradoxically, the migration restrictions put in place by European states after the 1973 oil crisis, and the introduction of visas by Spain and Italy in 1990-1, interrupted circulation and had the unintended effect of stimulating the permanent settlement of Moroccan workers in Europe, which subsequently triggered large-scale primary and secondary family migration through family reunification and formation. In fact, Moroccan migration over formally closed borders to Italy and particularly Spain actually *accelerated* through the 1990s and early 2000s. This can largely be explained by high demand for low-skilled labour in southern European countries. In addition, increasing numbers of skilled workers and students emigrated to Europe and North America.

Since around 2000, Morocco has also witnessed increasing immigration of migrants and refugees from sub-Saharan countries and, more recently, Syria. Initially, many of these migrants intended to use Morocco as a crossing point to Spain and further into Europe. However, Morocco has recently been reviving its long-standing position as a destination country. While increasing numbers of sub-Saharan migrants and refugees that have not ventured over or failed to reach Europe have settled semi-permanently, others see Morocco as a destination country, and particularly skilled sub-Saharan Africans often migrate to Morocco to work, study or do business. Alongside African immigration, Morocco has also witnessed increased immigration from Europe. This growing immigrant population partly consists of relatively wealthy retirees and entrepreneurs, but also of Spanish and other European young people seeking work and opportunities in Morocco, particularly since the global economic crisis (GEC).

With the growing presence of immigrants and their settlement in big cities, Moroccan society is confronted with an entirely new set of issues typical for immigration countries. These have prompted a rethink of Moroccan immigration policies and have created the conditions for the legalisation of irregular migrants in Morocco announced in 2013.

The analysis shows that although it is as yet uncertain whether these migration trends are a harbinger of Morocco's future transition into a net immigration country, and although Morocco remains primarily a country of emigration, under positive scenarios of political stability and economic growth its emigration potential may decrease in the future. If the spectacular declines in fertility are accompanied by growing economic opportunities, this may translate into decreasing unemployment, decreasing emigration and increasing immigration. However, this is far from certain as this scenario assumes political stability and sustained and equitable²⁰ economic growth.

Alongside accelerating emigration in the 1990s and 2000s and a rapid increase in annual holiday returns, efforts by the Moroccan Government to adopt more positive, benign policies than its past approach of repression and organised distrust towards migrants seem to have contributed to a major surge in remittances to about US\$8 billion to US\$9 billion around 2010, equal to approx. seven to eight per cent of Morocco's gross national product (GDP), and about six times the amount of official development assistance. Empirical studies have shown that expenditure and investments of remittances in housing and small businesses can contribute to increasing incomes (both directly and through multiplier effects), reducing poverty, employment creation and children's school attendance in origin areas. They also suggest that while financial remittances accelerate processes of 'modernisation', such as the 'micro-urbanisation' (see also Berriane 1996) of rural areas and the 'deagrarianisation' of rural livelihoods, 'social remittances' in the form of the transfer of different norms can set in motion processes of cultural change, or speed up existing trends, such as the accelerating effect Moroccan emigration to Europe had on Morocco's spectacular fertility decline between 1970 and 2010.

There has been much interest in the contribution of return migrants to development both from the Moroccan Government – which is eager to transform migration into a development driver – and from governments of European destination countries, who are often eager to stimulate return and see remittance-fuelled development

²⁰ Equitable' refers to economic growth that will also bring substantial economic benefits and social security to middle- and, particularly, working-class people, and will not mainly, or exclusively benefit those who are already wealthy.

as a way to reduce migration. There is, however, reason to be sceptical about these ideas as (i) it is unlikely that migration can be a real development ‘game changer’ and (ii) it is highly questionable whether development will actually reduce migration. In fact, particularly in poor areas and countries, social and economic development is more likely to have a migration-accelerating effect by increasing people’s capabilities and aspirations to migrate.

Migration can neither be blamed for a lack of development nor be expected to trigger development in unattractive investment environments. In many ways, development is a *pre-condition* for migrants to return and invest. Despite its considerable (micro/meso-level) benefits for individuals and communities, migration alone generally cannot remove (macro-level) structural constraints such as unfavourable investment conditions in Morocco, a lack of transparency and efficiency in administrative procedures, and problems related to the recognition of foreign degrees, and issues of legal security, especially regarding ownership of land, real estate and other assets. Although there have certainly been improvements in the Moroccan investment climate, and numerous migrants have been encouraged to invest, many problems persist. In addition, immigration restrictions also diminish the development potential of migration by obstructing the access of relatively poor people to migration opportunities and interrupting return and circulation.

Yet this cautionary note does not mean that migration cannot have a positive impact on development. In this context, the relevant question is not so much whether migration has positive or negative impacts, or whether return and investment projects fail or not, but *under what circumstances* such experiences are more successful, and under what circumstances migrants cancel their plans or see their investment fail to bear fruit. The stakeholder interviews showed that in order to understand the widely diverging experiences and development potential and implications of return migration, it is useful to distinguish between four categories of returnees: (1) **Involuntary return migrants**: formerly undocumented migrants who were deported back to Morocco, who often suffer from significant psychosocial problems and marginalisation both in Europe and in their home communities, and who generally aspire to remigrate; (2) **Low-skilled voluntary return migrants**: mainly consisting of recent returnees, particularly those coming back

from Italy and Spain after the GEC and whose return was technically voluntary but rather reluctant; they are often rather poor and low-skilled and their return experiences differ depending on their skills, motivation and family resources back home; while many have similar problems to the first category, and while their ‘failure’ fuels a desire to remigrate, a minority have successfully set up small businesses, sometimes with the help of financial support from European governments; (3) **High-skilled voluntary return migrants**: Moroccans who studied and/or worked abroad for a while before returning, often setting out with the explicit intention of returning to settle back and/or invest in Morocco; this is a high-potential category in terms of economic contributions and chances of success; and (4) **second generation ‘quasi-returnees’**: economically successful children of the guest-worker generation who have developed return and investment plans, sometimes in partial reaction to racism and islamophobia in Europe, but also in search of business opportunities; they often face similar problems of integration and adaptation to European investors without Moroccan heritage. In addition to the returnees, immigrants and refugees who have settled in Morocco also show an increasing desire to work and set up businesses.

In order to facilitate the successful economic and social (re)integration of these different groups, policy approaches need to be adapted to their differing needs and socio-economic situations. Stakeholder interviews suggested that it is wise to concentrate support for business development on returnees (whether low- or high-skilled) and immigrants who are intrinsically motivated and capable of working and setting up small and medium-sized enterprises. Assistance, guidance and training in setting up their businesses, and possible support in buying some equipment, can increase the chances of success (as opposed to purely financial support).

In this context, one stakeholder aptly stated that ‘return is also an investment’. This also applies to the social and economic integration of sub-Saharan migrants in Morocco. Without adequate financial and social means, return and immigration can easily end in failure. This explains why most returnees are individual migrants, and very few families return. Once the family is settled in Europe, the migration generally acquires a permanent character, with low chances of return. Governments and NGOs often focus on maximising the numbers of return migrants assist-

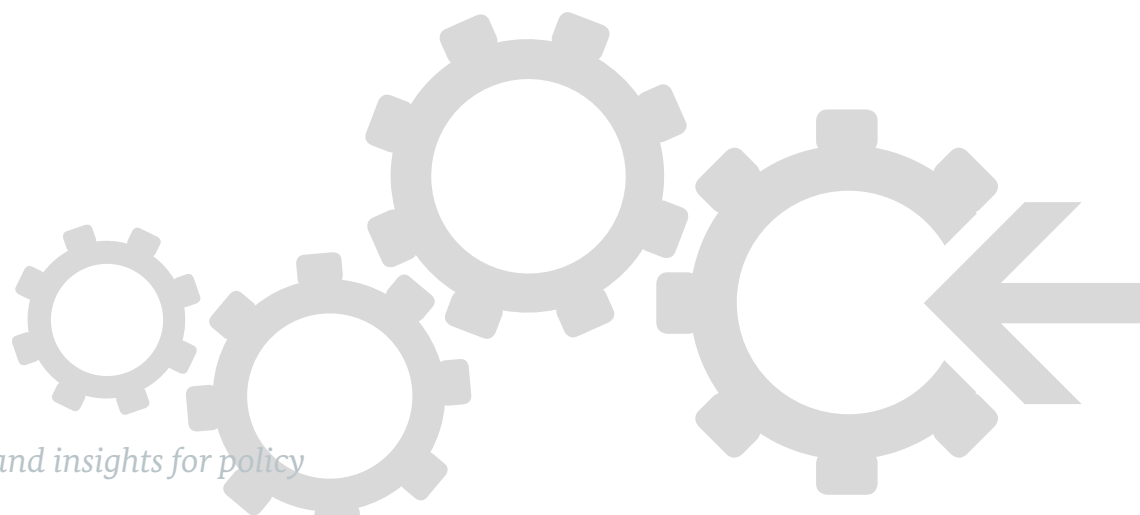
ed. While this may fulfil an institutional need to boost the effectiveness of such programmes, stakeholders indicated that in this way the money gets spread too thinly, and that it may be wiser to provide greater financial support and guidance to a smaller number of highly motivated return migrants.

Sub-Saharan immigrants and (quasi-)return migrants who wish to work but lack the qualifications, or whose foreign qualifications (either from European or sub-Saharan educational institutions) are not recognised, can benefit from support for certified vocational training and language and integration courses in Morocco, as this enables them to enter the formal labour market. Greater ease in obtaining work permits for foreigners will prevent their exploitation on the labour market as informal, unprotected and low-paid workers or 'interns'. To reduce discrimination on the labour market and promote their integration, self-reliance and contribution to the Moroccan economy, sub-Saharan immigrants need legal provisions to better protect their social and labour rights and to give them and their children access to public education and health care.

The study shows that there is little point in expecting involuntary return migrants or marginalised voluntary return migrants to be successful in business ventures. This particularly applies to those who suffer from psychosocial problems, do not feel accepted back home, have no family resources and lack the overall motivation and mindset to invest. In fact, many of them wish to remigrate. Stakehold-

ers working with such return migrants highly recommend concentrating assistance on their social integration into Morocco, such as by providing social services and counselling and giving practical support, for instance in the form of housing and furniture. It seems futile and a waste of resources to 'force' this category to be business people. In other words, it appears a contradiction in terms and wishful thinking to associate *forced* or 'reluctant voluntary' return with economic development.

That does not mean that this category does not have needs. On the contrary, it is the population group with the highest level of poverty and which is most in need of assistance. Currently neither the Moroccan Government nor destination country governments give adequate support to these categories, as they are one-sidedly focused on supporting economic investments and the success stories of high-performing and skilled returnees. Ironically, they need less support than the forgotten category of failed and marginalised return migrants. This exposes a fundamental policy dilemma: although governments and NGOs may be drawn to support talented and successful migrants for publicity purposes, this may divert attention and resources away from those vulnerable, marginalised, poor and generally low-skilled Moroccan return migrants and sub-Saharan immigrants who are most in need of support and protection, but are unlikely to provide a nice photo-op or newspaper cover story.

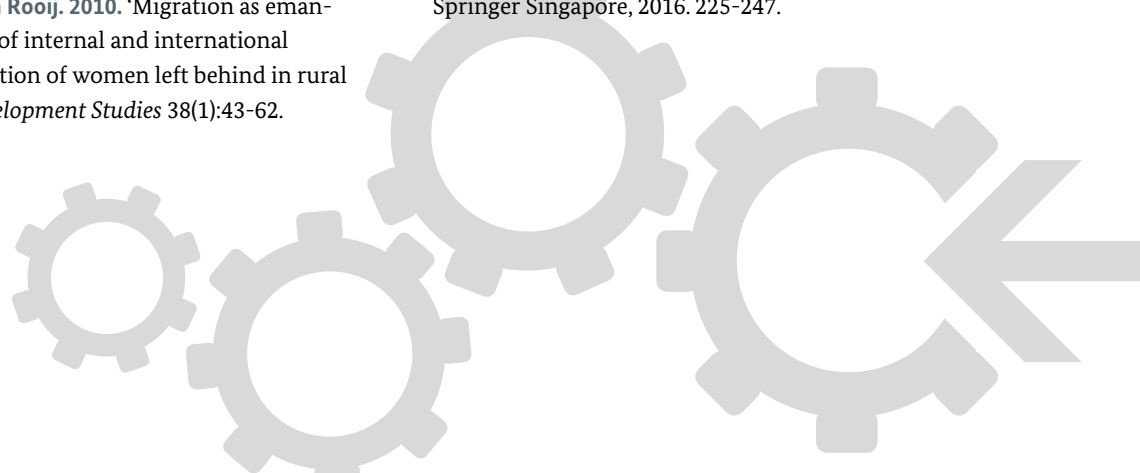


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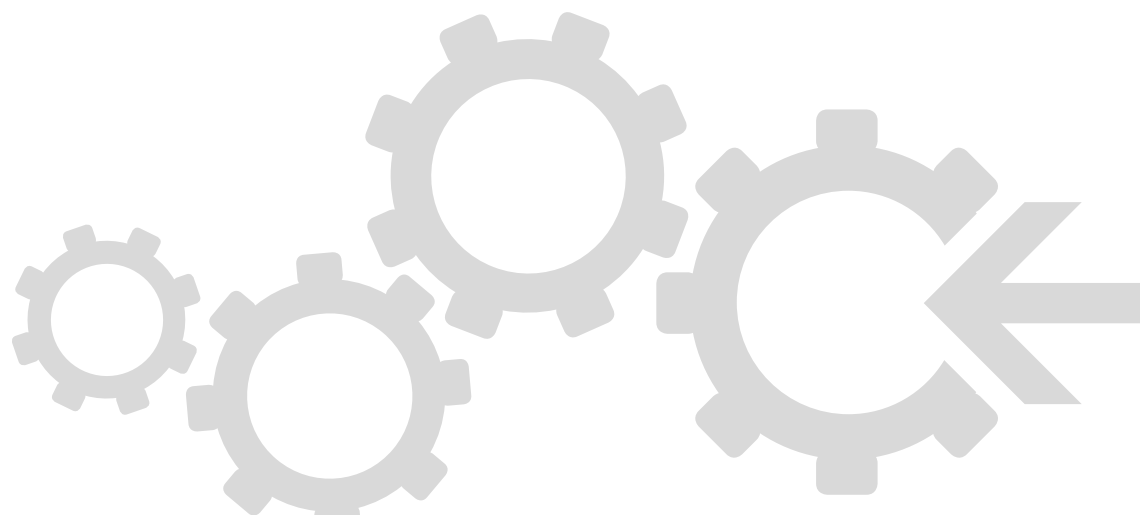
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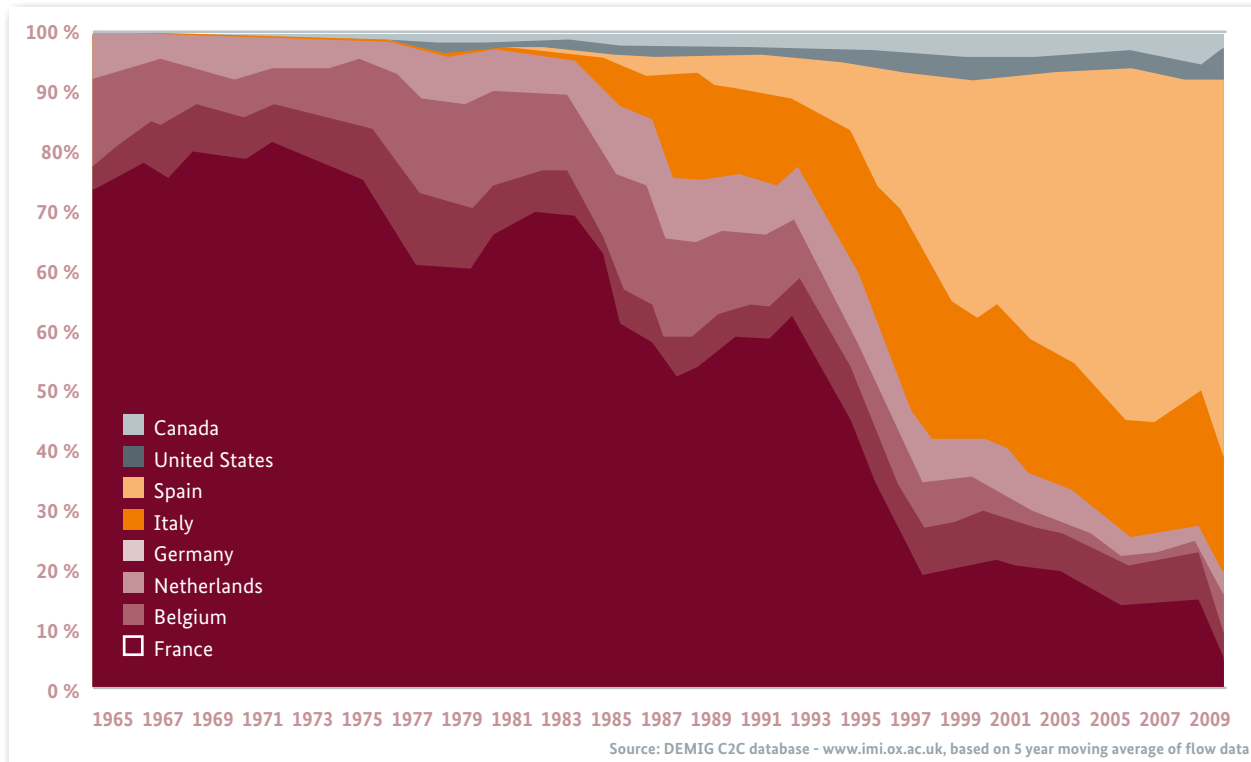
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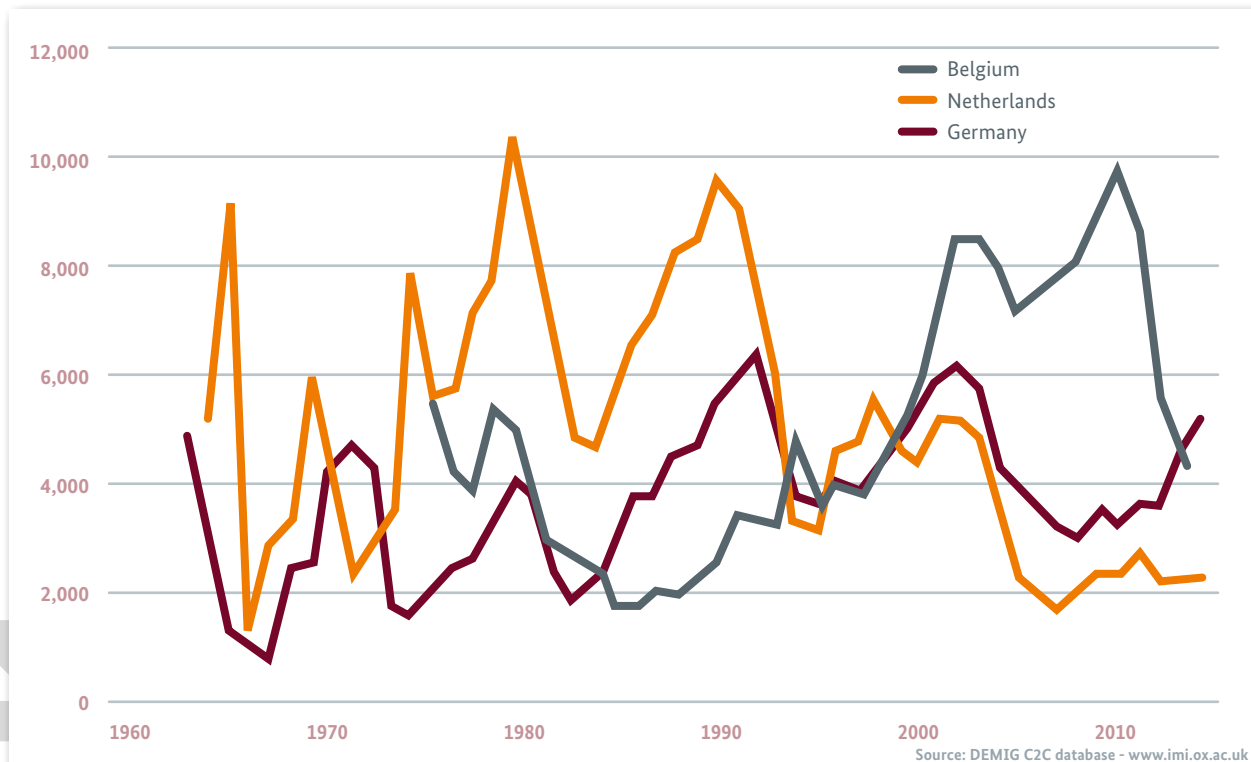
ANNEX 1

Key Moroccan migration trends

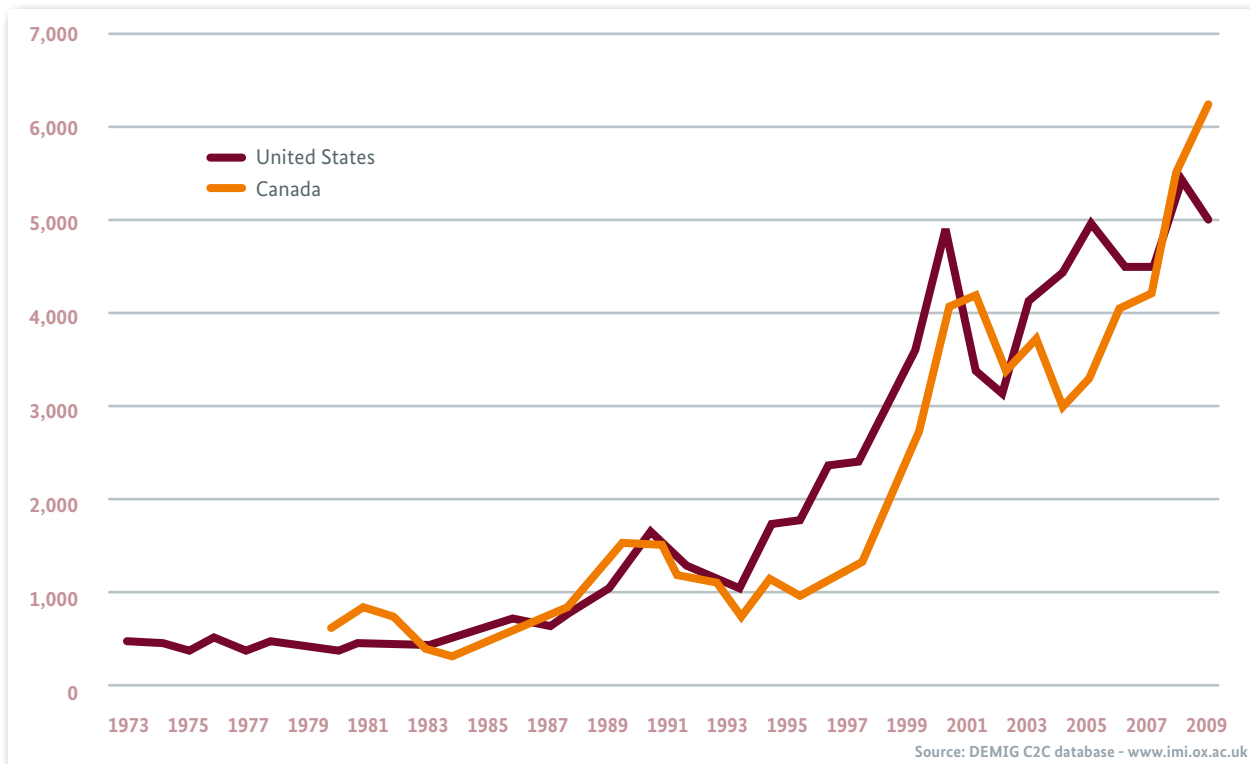
TRENDS IN GEOGRAPHICAL ORIENTATION OF MOROCCAN EMIGRATION



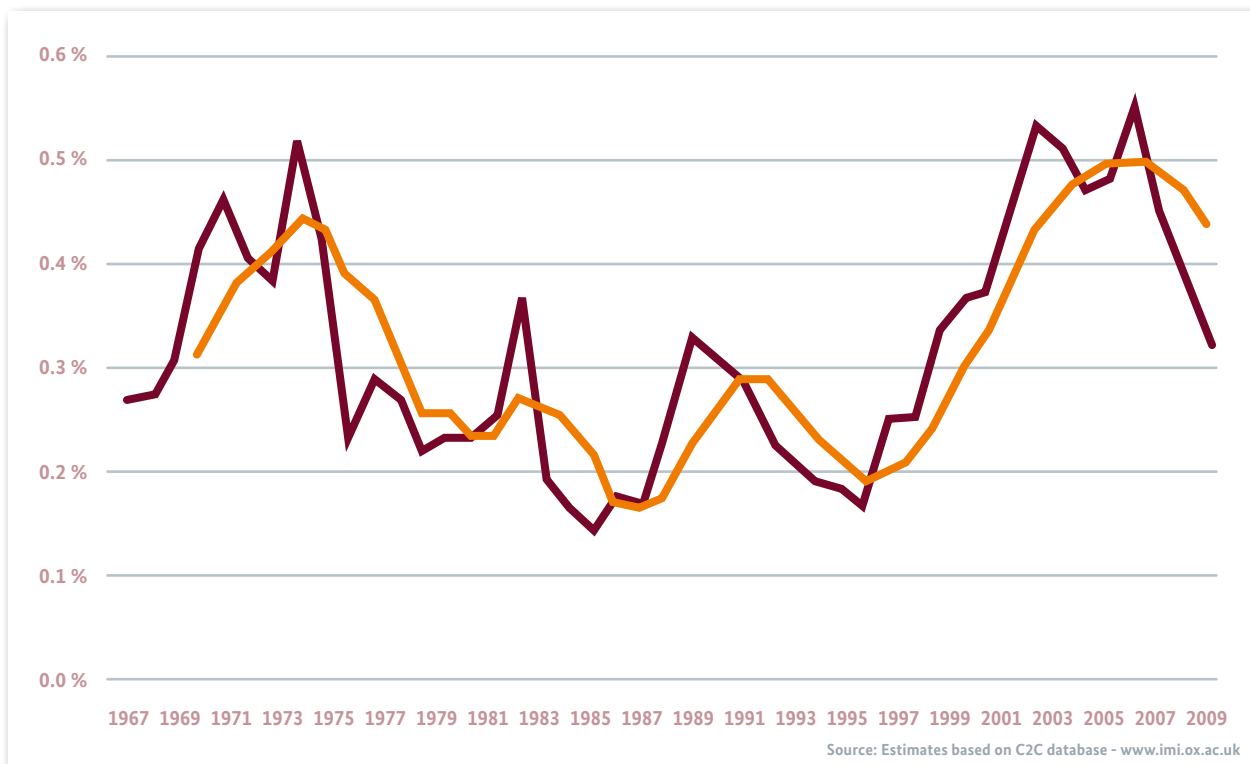
MOROCCAN EMIGRATION TO GERMANY, BELGIUM AND THE NETHERLANDS, 1963-2015



MOROCCAN MIGRATION TO THE UNITED STATES AND CANADA



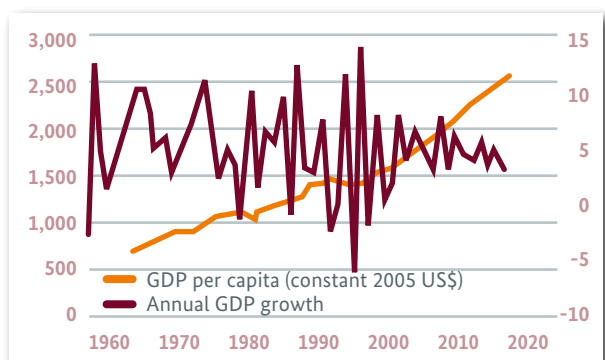
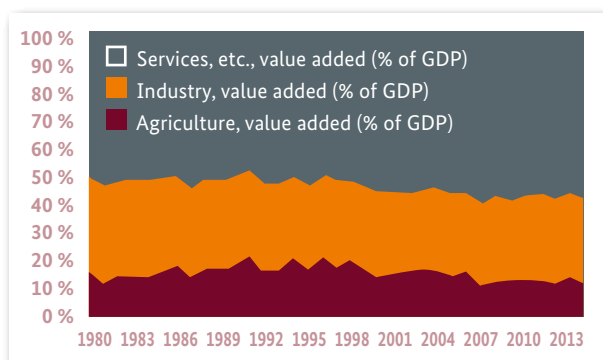
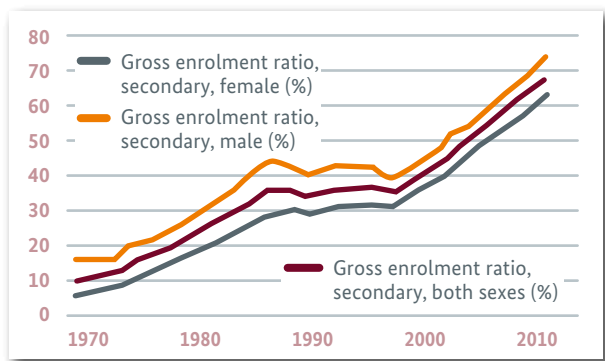
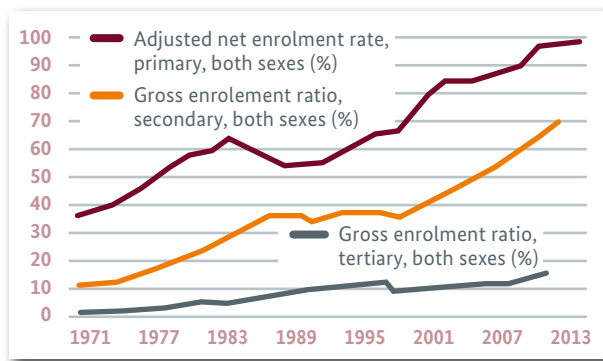
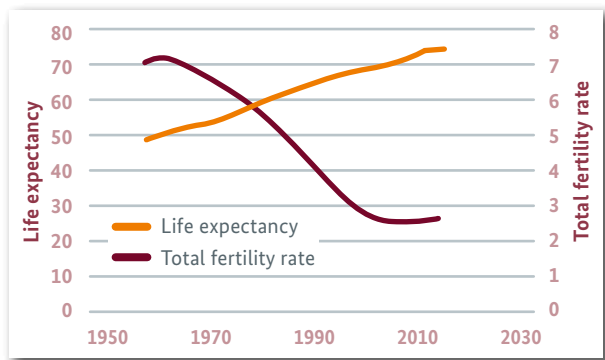
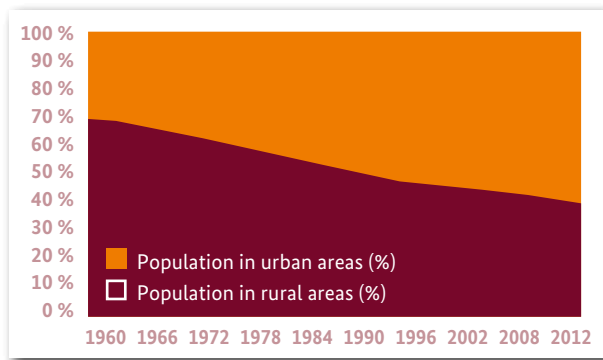
MOROCCAN MIGRATION RATES TO EUROPE



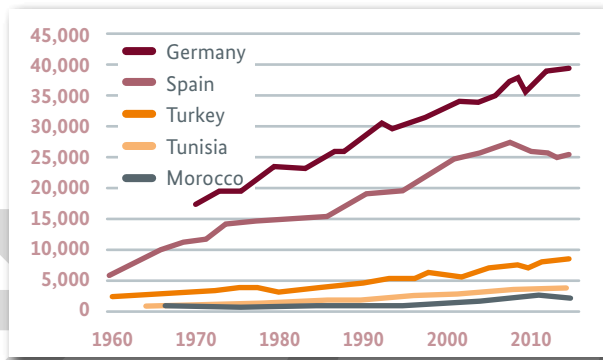
ANNEX 2

Key development trends for Morocco, 1960-2014

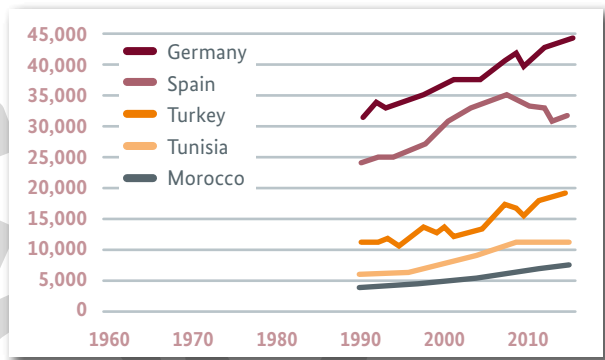
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GDP PER CAPITA (CONSTANT 2005 US\$)



GDP PER CAPITA, PPP (CONSTANT 2011 INTERNATIONAL \$)



Source: World Development Indicators, World Bank

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