

Global Migration Futures

Using scenarios to explore future migration
in the Horn of Africa & Yemen

Project report. November 2012



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The Regional Mixed Migration Secretariat (RMMS)

Formed in 2011 and based in Nairobi, the overall objective of the RMMS is to support agencies, institutions and fora in the Horn of Africa and Yemen sub-region to improve the management of protection and assistance response to people in mixed migration flows in the Horn of Africa and across the Gulf of Aden or Red Sea in Yemen. The co-founders and Steering Committee members for the RMMS include UNHCR, IOM, DRC, INTERSOS and the Yemen MMTF. The RMMS is therefore a regional hub aiming to provide support and coordination, analysis and research, information, data management and advocacy. It acts as an independent agency, hosted by the DRC, also aims to be a sector catalyst stimulating forward thinking and policy development in relation to mixed migration. Its overarching focus and emphasis is on human rights, protection and assistance.

www.regionalmms.org



The International Migration Institute (IMI)

Established in 2006, the IMI is a member of the Oxford Martin School and also forms part of the Oxford Department of International Development, where it is based, and collaborates with other migration centres and researchers at the University of Oxford. IMI is committed to developing a long-term and forward-looking perspective on international migration, seeing migration as part of broader processes of global change and development. In 2008, IMI, with support from the Oxford Martin School, the Foundation 'The Hague Process on Refugees and Migration', and Boeing's Global Corporate Citizenship Program began the Global Migration Futures: Towards a Comprehensive Perspective project with the aim of developing scenarios for the future of global migration. Innovative thinking about unexpected changes in the structural factors driving migration and building an international network of migration experts and stakeholders occupies a central place in this project.

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Section 1: Overview of the project

The Horn of Africa and Yemen is home to highly visible migration flows, whose numbers have been increasing over the last two decades. Migration in this region has been described as ‘mixed’, a term used to capture the varied social, economic, political, and environmental motivations of individuals who utilise similar migration channels and trajectories, and, as the insights from this project emphasize, the multiple motivations for migration that may co-exist within the same individual. The term ‘mixed’ migration may also describe migrants whose motivations for movement may have changed en route, causing them to switch between the different legal categories of migration for which they might qualify.¹

While the migration literature recognises the main drivers of movement in the region, the regional dialogue on ‘mixed’ migration remains weak and current initiatives tend to be local and scattered and often fail to account for the existence of all forms of mobility in the region. The emergency conditions, particularly the violations against migrants’ human rights, which persist in parts of the region, often lead to short-term research and planning, and prioritise mechanisms for the protection of migrants’ human rights. While essential, this focus can prevent the promotion of research that captures all forms of mobility, from internal to international, and the development of longer-term perspectives and reflections on how the conditions in the region may change over time and how these changes may impact international migration in the future.

From January to August 2012, the Global Migration Futures (GMF) project of the International Migration Institute collaborated with the Regional Mixed Migration Secretariat (RMMS) in Nairobi to promote discussions on possible longer-term developments in the region and to create scenarios for future international migration to, from and within the Horn of Africa and Yemen in 2030. Through this collaboration,

the GMF research team investigated the patterns and drivers of contemporary movement and the potential futures of migration flows, as well as the scale and scope of the various protection and assistance mechanisms required for the near and mid-term future.

It is important to emphasize that the project’s scenarios are *not* predictions or forecasts of the future, rather they are possibilities of what the region’s key migration drivers and patterns may be in 2030. Scenarios serve as tools for innovative thinking about future change and are created through a series of exercises carried out by experts and stakeholders in migration in the Horn of Africa and Yemen.

This report is organised in sections that reflect the scenario building process:

- **Section 2** introduces the core elements of the scenario methodology and the role of stakeholders in the development of scenarios.
- **Section 3** presents past and present migration dynamics and patterns in the region.
- **Section 4** discusses trends that are significant in shaping migration and for which researchers are relatively certain – based on available data and knowledge – will continue through 2030 – e.g. population growth.
- **Section 5** explores the factors that are highly uncertain in terms of how they will take shape in the future. They highlight trends that need to be monitored because they may substantially impact the volume and direction of future migration – e.g. forms of governance.
- **Section 6** presents two scenarios of possible futures in the region, their potential consequences for migration, as well as offering a number of insights and important questions for future migration research and policymaking.

¹ Jureidini, R. (2010). ‘Mixed Migration Flows: Somali and Ethiopian migration to Yemen and Turkey’. Cairo, Mixed Migration Task Force.

Section 2: Outline of the methodology

Research on the future of international migration has generally relied on conventional probabilistic methods based on historical data to produce quantitative estimates of future migration flows. Probabilistic projections have practical and conceptual limitations, which often lead to problematic results.² Projection models require the availability of migration data as well as datasets for migration determinants such as education, economic growth, and technological development. In the Horn of Africa and Yemen, data for indicators such as literacy, education, and per capita gross domestic product are limited. Additionally, some key drivers are difficult to represent through quantitative data, such as political and ideological changes and the introduction of new international regimes (e.g. international protection laws). Moreover, to understand how migration drivers may impact future migration flows, researchers must make assumptions about how drivers may change, or remain constant, in the future, e.g. population growth and income levels in 2030.

Conventional projections also imply conceptual limitations, which challenge their effectiveness in understanding the future. For instance, they do not take into account that some factors, such as education, not only drive and shape migration but also are affected by migration through feedback mechanisms. They assume that current drivers of migration will continue to be relevant in the future, and that new drivers will not emerge. For centuries technological change may not have been a strong driver of migration; however, since the introduction of fast modes of transport and communication, technological advancement has become a fundamental factor shaping internal and international mobility.

Unlike projections, scenarios are not descriptions of *likely* futures; rather, they are

detailed representations of *possible* futures within which researchers and policymakers can explore *possible* migration outcomes. By exploring 'potential' futures, the scenario methodology is not constrained by data availability and consistency over time and can address the conceptual challenges found in migration research. The first phase of the project's methodology consisted of conventional components of social science research, such as the development of a conceptual framework on future migration; a review of the literature on past and present migration drivers and patterns in the region (see Section 3); and descriptive data analysis of key demographic, social, economic, and technological indicators in its examination of trends that are relatively 'certain' to continue in the region until 2030 (see Section 4).

Also during this phase, the research team established the scenarios' time horizon at 2030. Time horizons depend on the dynamism of the context under study. When studying the future of the oil or shipping industry, time horizons can be 50 years into the future, while for the fast-paced technology sector, it can be less than five years. Because drivers of international migration include factors that are both fast and slow to change, scenarios have to assume a mid-range perspective. This timeline allowed participants, who are often engaged in emergency work in the region, to think beyond their short term concerns and consider longer term, more uncertain regional changes.

In the second phase of the project, the research team developed and disseminated a comprehensive survey to a group of migration experts and stakeholders from civil society, governments, the private sector, the media, and international organisations in the Horn of Africa and Yemen, most of whom would participate in the project's scenario building workshop. The involvement of migration stakeholders from different sectors is a core component of this project's methodology. It recognises the diversity of knowledge, interests, and capacities that exist in the migration space and ensures they are accounted for in explorations of potential futures. Survey respondents were prompted to identify the forces that drive and constrain migration

² de Haas, H. et al. (2010). 'Global Migration Futures: A conceptual and methodological framework for research and analysis.' Oxford, International Migration Institute; Dustmann, C., et al. (1996). 'Return Migration: The European Experience.' *Economic Policy* 11(22): 213-250; Khan, H., and Lutz, W. (2007) 'How well did past UN Population Projections anticipate demographic trends in six Southeast Asian countries?' In Oxford Institute of Ageing Working Papers. K. Howse, ed: Oxford Institute of Ageing Working Papers.

within, to, and from the region and were asked to describe likely and unlikely future scenarios of international migration. The research team published a briefing³ that analysed the survey data and used its insights to create a baseline for discussions during the project's scenario building workshop.

The third phase of the project consisted of planning and conducting a two-day scenario building workshop with approximately 25 migration experts and stakeholders. During the workshop, participants took part in exercises and discussions that encouraged information sharing on the forces that drive and shape migration. Exercises on the first day asked participants to identify factors which they perceived were certain to take place in the future, as well as factors which were highly uncertain and had the potential to significantly impact migration. Exercises on the second day prompted participants to generate scenarios based on their list of key certainties and uncertainties. Throughout the discussions, participants often introduced novel ideas and events that they observed in their daily encounters with migration, which appeared to be gaining in frequency. These are sometimes described as 'weak signals' and can represent insights of things to come, which may significantly alter the region in the future.⁴

Additionally, in discussion sessions, participants were sometimes confronted with dissimilar opinions, their assumptions were challenged, and tensions arose.⁵ This uncomfortable process led participants and the research team to enhance their awareness of migration processes in the region and to stretch the range of possible future developments that may be taking shape. In the project's final phase the research team examined and further developed the key

certainties and uncertainties, and the preliminary scenarios created by experts and stakeholders at the workshop. Of the eight scenarios created during the workshop, participants selected two for the team to develop into narratives (see Section 6). In addition to advancing the scenarios through further research and iterations of the scenario building exercises, the research team disseminated the 'second-generation' scenarios to a select group of experts and stakeholders from the workshop for an internal review. Engagement with participants has been an important element of the project. By including structured and frequent input from participants, the scenarios have benefited from an in-built peer-&-non-peer review system. The final project scenarios are plausible and internally consistent, yet their main aim is to challenge existing expectations of the future.

Preparing for the unexpected is a key objective of scenarios, which push decision makers to question what would happen should unlikely (yet plausible) changes take place. Critiques to the scenario methodology include the difficulty of evaluating consistencies among variables, the possible frustration among some stakeholders who may want more immediate solutions⁶ and the important commitment of resources and research personnel to carry out scenario-building activities with key stakeholders.⁷ Nonetheless, the scenario methodology has been a beneficial complement to conventional social science research and a useful tool to explore the future of international migration in the Horn of Africa and Yemen. The following sections will provide insights and results from the research phases carried out from January to August 2012.

3 Global Migration Futures (2012) 'Exploring the future of migration in the Horn of Africa: survey insights.' International Migration Institute. University of Oxford. Available at: <http://www.imi.ox.ac.uk/pdfs/imi-policy-briefings/pb-12-11-exploring-the-future-of-migration-in-the-horn-of-africa-survey-insights>

4 Van der Heijden, K. (2005). *Scenarios: The Art of Strategic Conversation*. West Sussex, England, John Wiley & Sons, Ltd.

5 Burt, G. (2008). 'From Causal Textures to Predetermined Elements to New Realities in Scenario Thinking and Practice'. *Business Planning for Turbulent Times: New Methods for Applying Scenarios*. R. Ramirez, J. Selsky and K. Van der Heijden. London, Earthscan.

6 Shackley, S. and R. Deanwood (2003). 'Constructing social futures for climate-change impacts and response studies: building qualitative and quantitative scenarios with the participation of stakeholders.' *Climate Research* 24: 71-90.

7 Rafael, R. et al. (forthcoming). 'Studying the Future in the Social Sciences: Scenarios as a Scholarly Method.'

Section 3: Past and present mixed migration dynamics in the Horn of Africa and Yemen

Theoretical background: the drivers of migration

This section analyses voluntary and forced migration trends and patterns in the Horn of Africa and Yemen over the past decades.⁸ It examines the ‘migration potential’ of countries in the region by employing migration transition (macro-drivers) and migration systems (internal dynamics, feedback) theories. These theories challenge conventional push–pull models, which assume an inverse relationship between migration and income or other opportunity differentials, and provide more realistic views on how changes in the political-economic environment are likely to affect all forms of migration in the region.⁹ These theories also shed light on the macro-economic forces underlying forced migration patterns, affecting refugees and asylum seekers’ capabilities and aspirations and shaping destination decisions. Few models acknowledge the livelihood decisions that forced migrants make, as exploring their socio-economic considerations might appear to undermine their protected status.¹⁰

It should be emphasised that in the context of high political instability and conflict and economic crisis, *movements of individuals in search of security are likely to overlap with movements associated with broader processes of social and economic development*, yielding the mixed migration phenomena present in the region and other areas of protracted conflict and economic crisis. This is because at the ‘micro-level, threats to people’s lives and livelihoods are often hard to distinguish’, and at the ‘macro-level,

the political and economic elements of instability are often closely interwoven’.¹¹ Drawing from the fields of migration and forced migration highlights the two-pronged approach that is needed, and which is attempted by this report, to understand and plan for future mixed movements in the Horn of Africa and Yemen.

Historical and current empirical evidence shows that *human and economic development is associated with higher levels of mobility and migration*.¹² Transition theories argue that as economic development continues, societies go through migration transitions characterised by an inverted J-shaped pattern of emigration (see Figure 1). The relationship between development and emigration is typically non-linear, because increasing income, access to education and the media, as well as infrastructure and transport improvements will give more people not only the (i) the capabilities, but also (ii) the aspirations to migrate.¹³ The migration transition is the notion that societies and countries, in parallel with economic restructuring and concomitant social change and demographic transitions, experience a sequence of initially increasing emigration, the coexistence of significant but diminishing emigration and increasing immigration to eventually become net immigration countries.¹⁴ This reveals why middle-income countries generally have the highest relative levels of emigration. Moreover, this suggests that the Horn of Africa and Yemen – where the average level of GDP in 2010 was 1,735¹⁵ and where countries in the region fall within the bottom 23 per cent in global human development rankings adjusted for

8 This analysis draws on data released by the World Bank on global migrant stocks for the 1960, 1970, 1980, 1990 and 2000 census rounds.

9 de Haas, H. (2010a). ‘Migration transitions: a theoretical and empirical inquiry into the developmental drivers of international migration’. IMI Working Papers. Oxford, University of Oxford: 49.

10 Bakewell, O. (2011) ‘Conceptualising displacement and migration: Processes, conditions, and categories’, in K. Koser and S. Martin (eds.), *The Migration-Displacement Nexus: Patterns, Processes, and Policies*, Oxford: Berghahn Books.

11 Lindley, A. (2009) ‘Leaving Mogadishu: The War on Terror and Displacement Dynamics in the Somali Regions’. Working Paper. MICROCON Working Paper. P. 4 (Unpublished) citing Castles, S. and Van Hear, N. (2005) ‘The Migration-Asylum Nexus’ Paper presented at the International Association of Forced Migration conference, Sao Paulo, and Lautze, S. (1997) *Saving lives and livelihoods: The fundamentals of a livelihoods strategy*. Boston: Feinstein International Famine Center.

12 Massey, D. (1988) ‘Economic Development and International Migration in Comparative Perspective’, *Population and Development Review* 14(3): 383-413; Skeldon, R. (1997) *Migration and development: a global perspective*. Harlow, Longman; Zelinsky, W. (1971) ‘Hypothesis of Mobility Transition’, *Geographical Review* 61(2): 219-249.

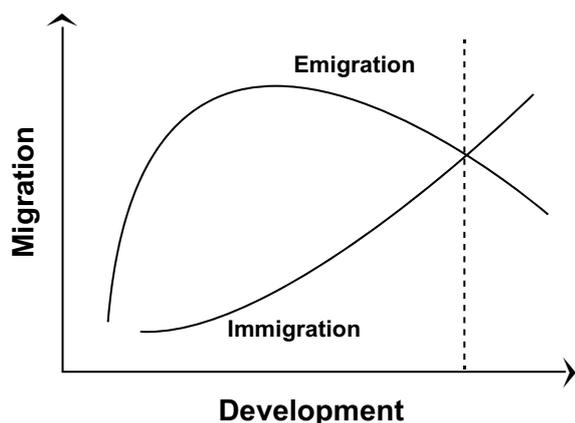
13 de Haas (2010a)

14 Ibid.

15 World Bank (2012) International Comparison Program Database

inequality in 2011¹⁶ – stands at the very start of migration transition. As economic development and greater political stability take root, people's capabilities and aspirations to migrate are likely to increase and we may witness *a considerable rise in rates of out-migration*.

Figure 1: Graphical representation of migration transition theory¹⁷



Source: de Haas (2010) Migration transitions: a theoretical and empirical inquiry into the developmental drivers of international migration'. IMI Working Papers. Oxford, University of Oxford

Only in the longer term, after sustained growth and decreasing opportunity gaps with destination countries, does emigration tend to decrease and countries tend to transform from net emigration into net immigration countries. *In the Horn of Africa and Yemen opportunity gaps will continue to remain high* over the next two decades despite the potential for improvement of socio-economic and political conditions, given the significant disparity between countries in the region and the large majority of rest of the world along most human development indicators.

These insights into the non-linear effect of development on out-migration are of crucial importance when exploring mixed migration scenarios, and lead to fundamentally different conclusions than if we would apply more conventional push-pull model and neo-classical theories. Transition theory is also crucial for understanding why impoverishment (for instance, through economic crises, war, or environmental factors) may actually *decrease*

people's capabilities to move, particularly over long distances. For instance, in Somalia, Lindley (2009) reveals how violence can hinder people's departure from Mogadishu by halting transportation systems, blocking roads, and impeding access to people's financial and social resources. Moreover, in explaining why Somali arrivals in Yemen had halved between January and March 2010 from the previous year, UNHCR stated that increased insecurity and a lack of funds to pay for the journey to northern Somalia and Yemen were responsible for constraining movement. During this same period, internal displacement from south central Somalia occurred at markedly high rates, as few Somalis could afford to seek asylum in Kenya and Ethiopia.¹⁸

For migration scenarios development, it is useful to link the temporal notion of migration transitions to the spatial notion of migration systems. A migration system can be defined as a set of places or countries linked by flows and counter flows of people, goods, services, and information, which tend to facilitate further exchange, including migration, between the places.¹⁹ The central assumption of migration systems theory is that migration alters the social, cultural, economic, and institutional conditions at both the sending and receiving ends and that initial exchange facilitates more exchange. Thus, *migration and flows such as trade and investment tend to reinforce each other*.²⁰ At the same time, the existence of *migrant networks facilitates further migration*, whether it is motivated by economic or humanitarian reasons. In this way, systems theory helps to understand how and why certain migration flows continue and circumvent national

18 UNHCR and IOM (2010). 'A long and winding road: background paper'. Regional Conference on Refugee Protection and International Migration: Mixed Movements and Irregular Migration from the East and Horn of Africa and Great Lakes Region to Southern Africa. UNHCR and IOM. Dar Es Salaam, Tanzania.

19 de Haas (2010b) 'The internal dynamics of migration processes: A theoretical inquiry'. Journal of Ethnic and Migration Studies 36(10):1587-1617; Fawcett (1989) 'Networks, Linkages, and Migration Systems'. International Migration Review 23(3): 671-680; Mabogunje (1970) 'Systems Approach to a Theory of Rural-Urban Migration'. Geographical Analysis 2(1):1-18.; Massey, et al. (1998) Worlds in Motion, Understanding International Migration at the End of the Millenium. Oxford, Clarendon Press.

20 de Haas (2007) 'Turning the tide? Why development will not stop migration'. Development and Change 38(5):819-841.

16 UNDP, Inequality-adjusted Human Development Index (2011)

17 de Haas (2010a)

policies that aim to prevent or reduce the entry and settlement of foreign nationals. In the Horn of Africa and Yemen, where pockets of highly uncertain political and economic contexts exist in proximity to areas of safety and economic opportunity, a variety of migration patterns and migration motivations are found. The increases in trade, business, economic growth and other indicators of development in certain parts of the region (see following section) show the relevance of transition theory, while not forgetting that protracted insecurity and the possibility of regional conflict may converge migrants' trajectories in search of various forms of security.

The migration literature has identified various feedback mechanisms which explain why, once started, migration processes tend to become partly self-perpetuating, leading to the formation of migrant networks and systems. For instance, the establishment of migrant communities and transnational networks may facilitate further migration through reducing costs and risks of migration, forming immigrant businesses and associational life, remitting money, spreading communication and transport links, as well as increasing trade. The same may be said for communities of forced migrants.

Based on ethnographic research in Egypt, Al-Sharmani (2007) shows the transnational, familial links that exist between Somalis in Egypt and their relatives abroad in the West, Gulf countries, and back home in Somalia. In one case, she discusses the aspirations of a young Somali woman to follow in the steps of her extended relations to travel to Europe to find work that will allow her to remit funds to her family in Somalia. When denied refugee resettlement, she asks her kin to lend her the funds to be smuggled to Europe to pursue her aspirations.²¹ This lends some insight into why migration is a relatively autonomous social process that is difficult for states to control. In situations of conflict and in the presence of 'porous' borders and weak infrastructure, the implementation of migration policies is a difficult process. For this reason,

²¹ See also Campbell (2005) 'Formalizing the informal economy: Somali refugee and migrant trade networks in Nairobi. Global Migration Perspectives, No. 47. Global Commission on International Migration.

migration within, to and from the Horn of Africa and Yemen is largely irregular.

Migration patterns and trends

Figure 2 shows the evolution of emigrant populations in the Horn of Africa and Yemen between 1960 and 2000. These populations include people who have left their countries of origin either as official migrants *or* asylum seekers, but *do not* include irregular migrants and unregistered asylum seekers, who may in fact outnumber registered emigrants. It shows that the number of total emigrants, including asylum seekers and refugees, has increased and that Yemen, Sudan, and Uganda have the highest populations. If the number of total emigrants is expressed as a percentage of the total origin country population, then Eritrea, Somalia, and Yemen appear as the most important emigration and displacement-generating countries.

There appears to be a clear link between these high figures from Eritrea and Somalia and the presence of political oppression or instability and generalised violence. It is important to note that, in relative terms, emigration and displacement from Ethiopia appears to be very low; only about 300,000 have left the country, 34,480 of whom have registered as refugees and asylum seekers in Kenya, with a population of approximately 85 million.²² If we accept that many Ethiopian emigrants and asylum seekers have an undocumented status and we double this figure, the total Ethiopian emigrant population still remains below one per cent of the total population.²³ In typical emigration countries such as Mexico and Morocco, expatriate rates are between five and 10 percent.²⁴

Overall, *emigration rates are relatively low across the region*, particularly if one considers that a

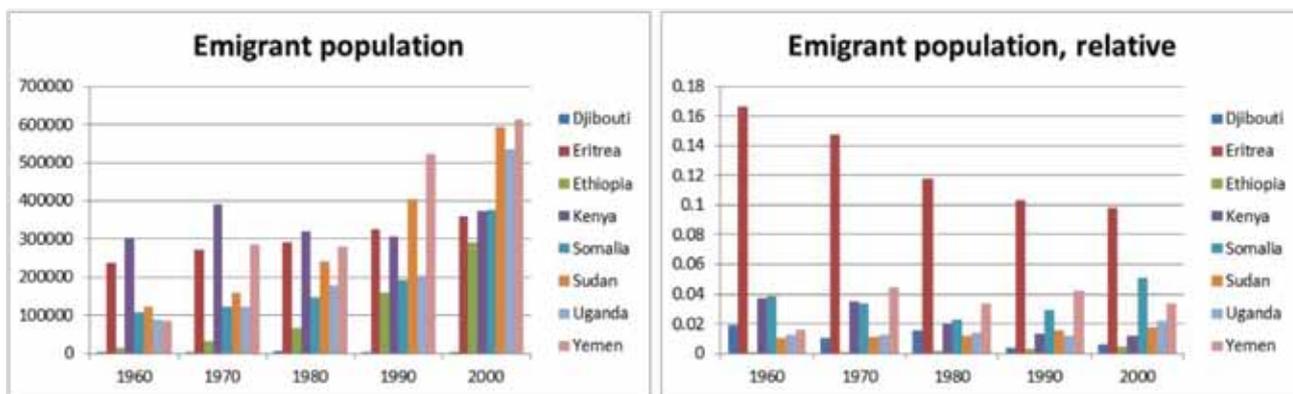
²² UNHCR (2012) '2012 UNHCR country profile operations - Kenya.' Retrieved 28 June, 2012.

²³ A number of NGOs working with the Mixed Migration Task Force to monitor new arrivals on the Yemeni coast estimate that in the last five years, approximately 250,000 Ethiopians have entered Yemen irregularly. Some of these migrants are deported and some return home after some months or years.

²⁴ de Haas, H. and Vezzoli, S. (2009) 'Migration and development: Lessons from the Mexico-US and Morocco-EU experiences'. Oxford: International Migration Institute, University of Oxford.

proportion of the ‘emigrants’ are in fact people who have left their countries of origin to seek asylum elsewhere. One may therefore argue that *the region has a significant future emigration potential*. This particularly accounts for countries like Ethiopia, where human and economic development may well lead to accelerating emigration. Once again, it should be noted that rates of emigration and displacement may be much higher once they take into account irregular migration. Unfortunately, it is difficult to know the extent of such migration. Horwood (2009) estimates that between 17,000 – 20,000 male migrants and refugees are smuggled from the Horn of Africa and East Africa to South Africa every year. Additionally, the Mixed Migration Task Force suggests that more than 50,000 irregular Somali and Ethiopian migrants crossed the Gulf of Aden to Yemen in 2008.²⁵

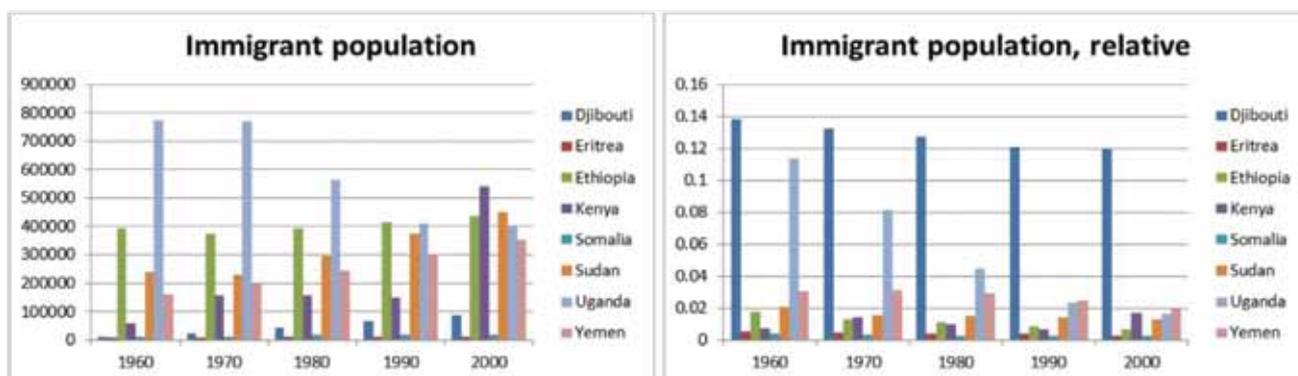
Figure 2: Authorised emigrant (including asylum seekers and refugees) populations by country



Source: World Bank, Global Bilateral Migration Stock Data, 2011

Figure 3 shows the evolution of immigrant, asylum seeker and refugee populations in the region. Uganda, Kenya, Ethiopia, Sudan, and Yemen have significant immigrant, asylum seeker and refugee populations. Immigration to Kenya has grown particularly fast, which seems to reinforce the idea that Kenya is an important regional migration and asylum destination. In relative terms, Djibouti has the highest immigrant population by a considerable margin. This may reaffirm Djibouti’s significance as a port for irregular migration to Yemen and the Gulf. It should be emphasised that in every country in the Horn of Africa and Yemen, immigrants, asylum seekers and refugees represent less than two per cent of the entire population – an entire percentage point less than the international average. Overall, the *relatively low levels of out-migration and in-migration* highlight the significant migration potential in the region, which may be stimulated by development processes as well as by potentially unstable political conditions.

Figure 3: Authorised immigrant (including asylum seekers and refugees) populations by country



Source: World Bank, Global Bilateral Migration Stock Data, 2011

25 UNHCR and IOM (2010)

Global migrant stock data from the World Bank show estimates of the main countries of destination of authorised emigrants (including asylum seekers and refugees) from the Horn of Africa and Yemen and the origin countries of authorised immigrants (including asylum seekers and refugees) settled in the region. It is important to be aware of the limitations of these data because, as mentioned previously, significant undocumented migration, prompted by mixed motives, occurs in the region. Nevertheless, they reveal some patterns and trends.

Only Kenya, Somalia, and Ethiopia have significant populations living in Europe and North America. Ethiopian emigrants predominantly live in the United States, and the roots of this migration lie in refugee migration. Ethiopians of Jewish faith have migrated to Israel since the mid-1980s, the most notable flows being in 1984-5 and 1991 when the Israeli government encouraged and supported such migration through Operations Moses and Solomon. The operations were missions to save Jewish Ethiopians from famine and political instability, respectively, as well as to promote the immigration of Jewish people as a part of state-building.²⁶

Since 2006, Sudanese and Eritrean asylum seekers have increasingly migrated to Israel, finding Cairo less hospitable in the wake of the refugee protests during which tens of refugees died.²⁷ They have described Israel as their first or second choice for asylum.²⁸ Somali emigration to the United States, the Netherlands, and Canada has its roots in refugee movement. Emigration from Kenya is not related to political conflict and follows more of a post-colonial pattern of authorised migration for work and education. There has been consistent authorised migration

from Kenya to the United Kingdom while such migration to the United States and Canada has recently been increasing.

Otherwise, international migration in the region has been predominantly short-distance. This seems to support migration transition theory, according to which long-distance migration is more likely to occur when countries develop. It is possible to distinguish a few intra-regional migration systems. First, Saudi Arabia and other Gulf countries are principal destinations for labour migrants for countries of the Horn and Yemen, with the exception of Kenya and Djibouti. Second, there has been significant movement from Somalia, Eritrea, and Sudan to Ethiopia, partly reflecting refugee flows.²⁹ Third, Djibouti is a significant (and for many, temporary) destination for migrants from Somalia and Ethiopia, for its coast offers access to Yemen and the Gulf. Additionally, Djibouti hosts more than 22,000 refugees and asylum seekers from Somalia, Eritrea and Ethiopia.³⁰

Fourth, migration to Kenya (from Ethiopia, Uganda, Somalia, and Sudan) seems to be increasing. While this partly reflects large and increasing refugee flows from Somalia, Sudan, and Ethiopia, this also seems to reflect Kenya's position as a regional migration hub. Trade in petrol and international goods coming from Eldoret,³¹ Kismayo and Mombasa also appears to generate a high level of trade-related mobility along the main road linking the Democratic Republic of Congo, Rwanda, and Uganda to and from Kenya. Moreover, Kenya has appeared as an origin and transit country for migrants aspiring to move to South Africa, which is a major African destination country.³²

26 Kaplan, S. and Salamon H. (2004) 'Ethiopian Jews in Israel: A part of the people or apart from the people?' in Rebhun, U. and C. I. Waxman (eds). *Jews in Israel: contemporary social and cultural patterns*. Hanover [u.a.], Brandeis Univ. pr., publ. by University Press of New England.

27 'Refugees Killed in Cairo Protest'. *Refugee Rights News*. Volume 3, Issue 1. February 2006. International Refugee Rights Initiative.

28 Paz, Y. (2011) 'Ordered disorder: African asylum seekers in Israel and discursive challenges to an emerging refugee regime', *New Issues in Refugee Research*, UNHCR Research Paper No 205. citing Afeefe (2009) 'A promised land for refugees? Asylum and migration in Israel'. *New Issues in Refugee Research*. UNHCR Research Paper No 183.

29 IOM (2012) 'Ethiopia'. Retrieved 28 June, 2012, from <http://www.iom.int/jahia/Jahia/ethiopia>; UNHCR Ethiopia (2012) 'Ethiopia Refugee Update' April 2012, UNHCR.

30 UNHCR (2012) '2012 UNHCR country operations profile – Djibouti' available at: <http://www.unhcr.org/pages/49e483836.html>.

31 In addition to being the site of a major oil pipeline, Eldoret is also a landing site for cargo planes from the Gulf bringing goods into Kenya. For these reasons, Eldoret is home to more than 40 bank branches.

32 Horwood, C. (2009). 'In Pursuit of the Southern Dream: Victims of Necessity, Assessment of the irregular movement of men from East Africa and the Horn to South Africa'. IOM. Geneva.

As mentioned previously, some forms of migration and mobility appear underrepresented in the official figures, which also do not capture some of the more recent migration and forced migration trends. This particularly pertains to irregular migration to Yemen and to Southern Africa. Monthly monitoring reports of the Regional Mixed Migration Secretariat suggest that while the number of migrants and asylum seekers travelling to Yemen remain consistently in the thousands, they may have doubled in absolute terms from 2011. The conditions of migration to Yemen are highly precarious, and put migrants and asylum seekers at risk of physical abuse, bribe paying, imprisonment, abduction, drowning, and *refoulement*.³³

destinations. The extent to which Yemen and Kenya serve as 'staging grounds' to move further afield, for instance to Saudi Arabia for Yemen and to South Africa for Kenya would also benefit from further study. The most striking observation from this section is that despite governments and international agencies within the region being overwhelmed and overburdened by irregular migrant populations, *migration from and to the region is relatively low* compared to most other world regions and that the *future potential for greater migration is high*.

Summary of key drivers

This section's synthesis of the available data on voluntary and forced migration in the Horn of Africa and Yemen and its discussion of important theories of development reveal that the key past and present drivers of movement within and from the region have been largely political and economic, including conflict, generalised violence, and a lack of employment and livelihood opportunities. The high levels of political volatility and repression in Ethiopia and Eritrea and the protracted Somali and Sudanese conflicts account for a large part of regional mixed migration patterns. However, other key socio-economic factors, such as cultural norms or collective livelihood strategies, which also play a role in shaping migration and forced migration decision-making appear understudied and underdeveloped. More generally, there is a lack of data and research on important forms of authorised and irregular migration by workers and (to some extent) students in the region, where Saudi Arabia and other Gulf countries are the main destinations, and Yemen and Kenya seem to function as secondary, intra-regional

³³ RMMS (2011, 2012) Regional mixed migration monthly updates. Nairobi, RMMS.

Section 4: Megatrends for future mixed migration in the Horn of Africa and Yemen region

Megatrends are 'long-term driving forces or... trends that influence almost everything at all levels of society. They have great importance now, and we are relatively sure they will also have great importance in the future.'³⁴ For the elaboration of scenarios, the identification of megatrends is an essential step in providing the framework of future mixed migration drivers that are relatively certain. Paradoxically, megatrends help to reveal areas of great uncertainty for the future. For instance, we know that increasing educational attainment is taking place in the Horn of Africa and Yemen, but we are uncertain as to whether this will prompt emigration as this depends on a range of other factors such as economic growth and labour market structures. Although education is likely to increase people's life aspirations, the extent to which these aspirations will result in increased migration depends on the extent to which the region will provide economic and social opportunities for the educated.

By carrying out a rigorous examination of megatrends, we can learn a lot about the future – both what we know and what we don't. This section provides insight into key demographic, educational, technological and other trends affecting the region which are likely to continue in the future. This overview is based on the relative certainties identified in the scenario exercises as well as background research by the GMF research team at IMI with regional expertise from RMMS.

Demographic trends

While virtually all countries in the world are at some stage of demographic transition, the Horn of Africa and Yemen are among the last areas to experience falling fertility rates. Figure 4 shows that, since the mid-1980s, most countries in the region are experiencing declining fertility

levels.³⁵ In Somalia and Uganda, fertility is still very high and stagnating at levels around 6.5, whereas they are lower and dropping faster in other countries. However, despite this decline, overall fertility is still amongst the highest in the world. This means that the significant population growth in the region is likely to continue in the coming decades. In the longer term, falling fertility may create a so-called 'youth bulge', characterised by a high proportion of (migration-prone) young adults within a population. If such demographic trends are not matched by growth of income and opportunities for the young, this can increase migration propensities.

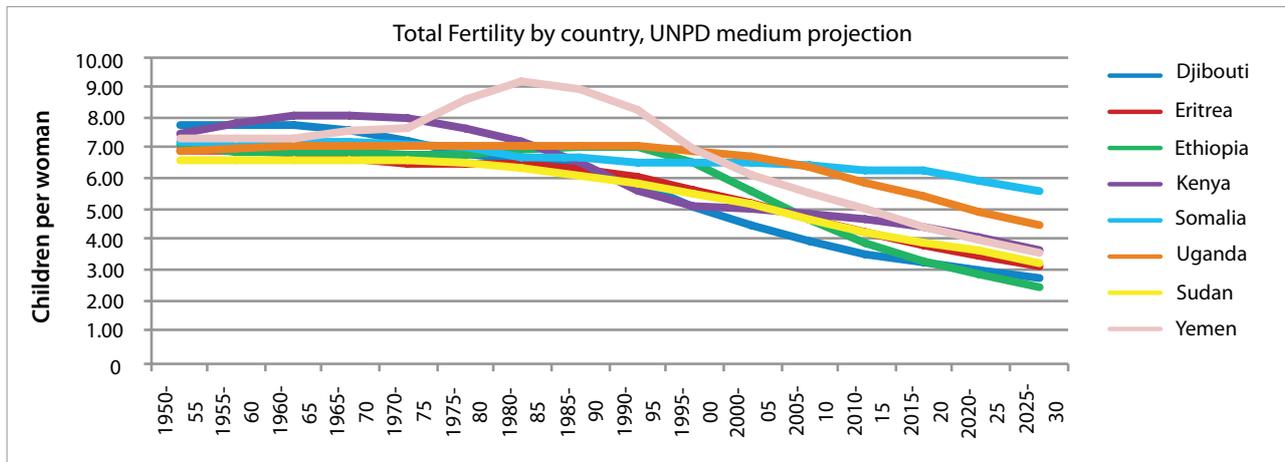
In addition to having the fourth highest fertility rate in the region, Yemen has one of the highest population growth rates in the world, along with Eritrea and Uganda. The National Population Council estimates that 700,000 people are added to Yemen's population each year (growth rate of three per cent). Its current population of 23 million is set to double in the next two decades. The UN Population Division estimates that the number of 10 to 25-year-olds will rise from 8.6 million (37 per cent of the population) to 20.8 million in the next 25 years if growth continues at the current pace. The data prompt one to question how rural and urban infrastructures and economies will accommodate such growth, particularly of young people who will be in need of education and employment. If population growth will not be matched by growing opportunities, this could potentially create conditions for political discontent.

Figure 5 shows the high population growth in the region, which is likely to continue in the future. Ethiopia is by far the most populous country in the region with over 80 million inhabitants. In fact, Ethiopia has the largest population of a land-locked country in Africa and the second largest population size of Africa (after Nigeria). Sudan, Kenya, Uganda, and Yemen have populations

³⁴ Perrson et al. (2008: 6) 'Strategic Futures Studies'. Member report No. 2. Copenhagen Institute for Futures Studies: Copenhagen.

³⁵ Total fertility is the mean number of children a woman would have by age 50 if she survived to age 50 and were subject, throughout her life, to the age-specific fertility rates observed in a given year. Total fertility is expressed as the number of children per woman. The replacement fertility rate – needed to keep populations stable – is around 2.1 children per woman. In most European countries, fertility rates are under or around two.

Figure 4: Total Fertility by country, UNPD medium projections

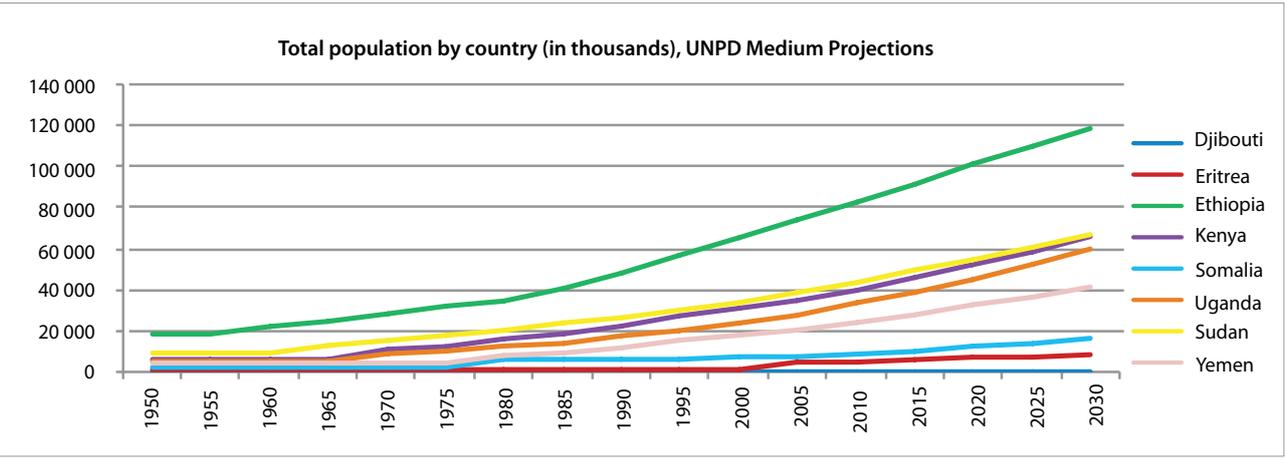


Source: United Nations, Department of Economic and Social Affairs, Population Division, Total fertility medium projections, World Population Prospects: The 2010 Revision, CD-ROM Edition, 2011.

between 25 and 45 million while Somalia, Eritrea, and Djibouti have populations under 10 million. Despite having the highest fertility rate in the region, Somalia features third from last in terms of absolute population. Somalia has the highest mortality rate in the region as well as relatively high emigration rates, which may explain why the country’s population growth rate is the second-lowest in the region.

Figure 6 shows that the percentage of 15-24-year-olds of the total population is high and for most slightly increasing to above 20 per cent. In comparison, the percentage of 15-24-year-olds in European countries is approximately 10 per cent. Unless unprecedented economic growth and employment opportunities occur, this would create a significant migration potential.

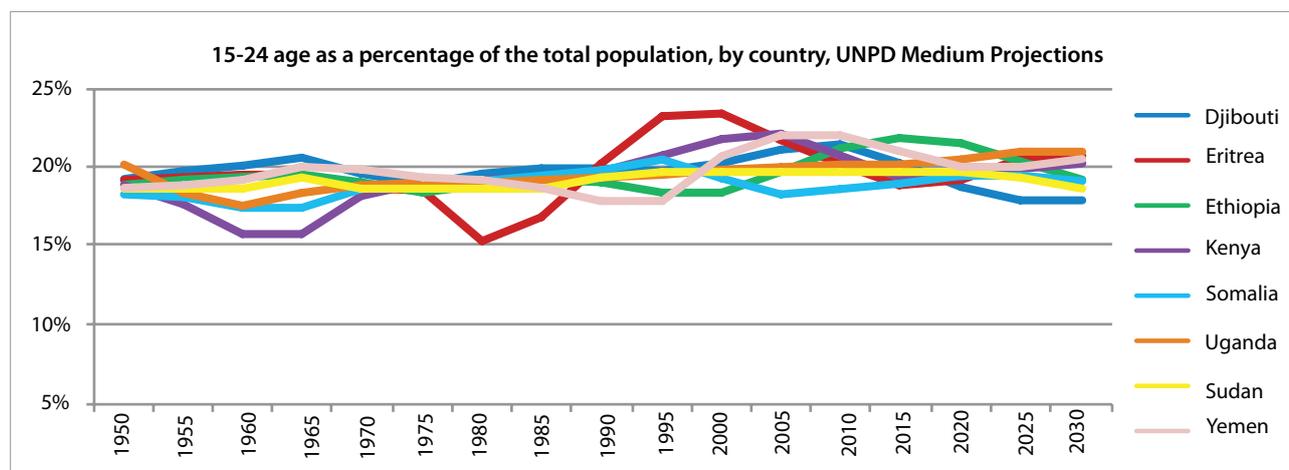
Figure 5: Total population by country (in thousands), UNPD medium projections



Source: United Nations, Department of Economic and Social Affairs, Population Division, Total population medium projections, World Population Prospects: The 2010 Revision, CD-ROM Edition, 2011.

Rising total populations coupled with environmental stress put multiple pressures on people and communities in the Horn of Africa and Yemen. Resource scarcity (and conflict), limited livelihood opportunities and unemployment fuel migration both from the pastoral and agricultural areas of the

Figure 6: 15-24 age as a percentage of the total population, by country, UNPD medium projections



Source: United Nations, Department of Economic and Social Affairs, Population Division, Total population (both sexes combined) by five-year age group medium projections, World Population Prospects: The 2010 Revision, CD-ROM Edition, 2011

region and this may continue over the coming years and decades.³⁶ In Somaliland, unemployment continues to be a factor in prompting young people, especially school-leavers and university graduates, to migrate to Europe and the Gulf states in search of better opportunities.³⁷ The weighted average national employment rate in Somaliland is estimated at 52.6 per cent. Unofficial estimates suggest that at least 65-70 per cent of Somaliland's 3.5 million people are below the age of 30 and unemployment among the youth stands at 75 per cent.³⁸

Despite being a growing commercial hub in the region, Kenya struggles to offer places at university and other academic institutions to aspiring students as well as jobs to the rising number of young people – an increasing number of whom are secondary school-leavers or tertiary educated. Many skilled and educated Kenyans have therefore sought work overseas. Like many African-origin students studying abroad, many do not return when their studies are complete because they encounter a number of professional, social, and personal factors which prompt them to stay.³⁹ Each year, recruitment agencies organize visas for an average of 17,000 Kenyans to work in Saudi Arabia alone.⁴⁰

In recent years the proportion of Ethiopians represented in the mixed migration flow data reported by RMMS has increased considerably, outnumbering Somalis.⁴¹ Ethiopia has a high total population that is growing at a rate of 2.92 per cent per annum and a land area of 1.1 million square kilometers, upon which the majority of the country engages in subsistence agriculture. High population growth alongside poor agricultural management has contributed to endemic food insecurity. The absolute increase in total human and livestock populations has led to smaller sized holdings of arable land.

36 Piguet, F. (2007) Complex development induced migration in the Afar Pastoral Area. American University in Cairo. See <http://www.google.co.ke/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&ved=0CEkQFjAA&url=http%3A%2F%2Fwww.aucegypt.edu%2FAPP%2Fcmrs%2FDocuments%2FFrancoisPiguet.pdf&ei=9foIUpa4L9S7hAeynNnnCQ&usg=AFQjCNHvHwflz8Ilmpc89YjwynCBsxEpQ> accessed on July 20th 2012.

37 IRIN (November 22, 2011) Available at: <http://www.irinnews.org/printreport.aspx?reportid=94285>

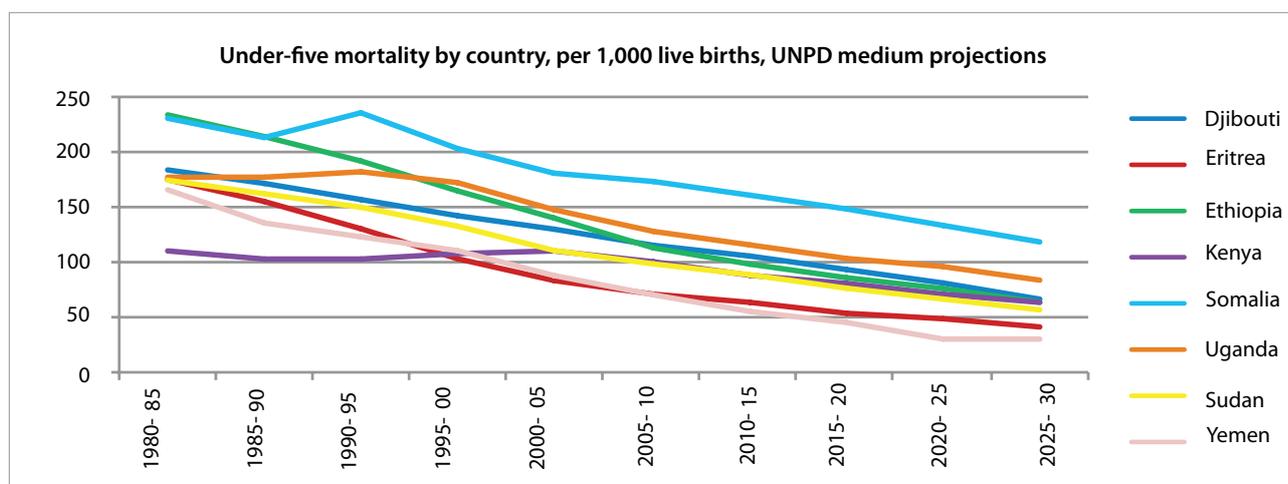
38 Somaliland National Development Programme see http://www.slministryofplanning.org/images/nationI_plan/ndp.pdf

39 For example, <http://www.uwosh.edu/facstaff/alberts/research-publications/docs/Visitors%20or%20Immigrants.pdf>

40 Daily Nation (April 03, 2012) see <http://www.nation.co.ke/oped/Opinion/Kenyan+workers+in+Saudi+Arabia+are+safe+/-/440808/1379474/-/ufo0at/-/index.html> accessed on July 20th 2012. Additionally, an expert recently quoted on Kenyan radio (September 2012) suggested that 10,000 maids and 40,000 skilled professional Kenyans work in Saudi Arabia.

41 RMMS (2011, 2012)

Figure 7: Under-five mortality by country, per 1,000 live births, UNPD medium projects



Source: United Nations, Department of Economic and Social Affairs, Population Division, Under-five mortality (for both sexes combined) medium projections, World Population Prospects: The 2010 Revision, CD-ROM Edition, 2011.

Land management in Ethiopia is concentrated in the hands of the government, which owns all land and farmers are unable to buy and sell land. As they grow, families must rely on the same plot of land to feed more people. Only one per cent of farmers own holdings greater than five hectares, which are likely to be concentrated in the sparsely populated areas with low agricultural potential.⁴² For families holding small plots, migration may become a solution, which at once reduces pressure on limited family resources and contributes to spreading the risks of insecurity faced by the household. Migration potential will continue to depend on the household's capacity to sustain the initial costs of migration as well as on the economic opportunities available in Ethiopia and in the other countries within the region.

Health trends

Despite the region's status as one of the poorest and politically unstable in the world, falling infant mortality (see Figure 7)⁴³ and rising life expectancy (see Figure 8)⁴⁴ seems to indicate improved access to (basic) healthcare, although infant mortality is still high and life

expectancy still low by world standards. Poor health standards are linked to the region's persistent struggles with severe poverty, lack of access to potable water, poor sanitation, and poor nutritional levels. In the 1980s and 1990s life expectancy dropped in several countries, particularly Kenya and Uganda, which was presumably related to HIV/AIDS, and Ethiopia, which was linked to severe famines. However, these trends have reversed over the past two decades. Decreases in mortality and increases in life expectancy counterbalance the effect of fertility decline on population growth. Moreover, future improvements in healthcare will contribute to population growth.

It should be noted that the distribution of healthcare services and qualified medical staff to urban and rural areas in the Horn of Africa and Yemen is highly inequitable. People living in remote and rural areas have to migrate (temporarily or more permanently) to access healthcare. Somalis who can afford to often bring their families to Nairobi or Mombasa to access hospital services.

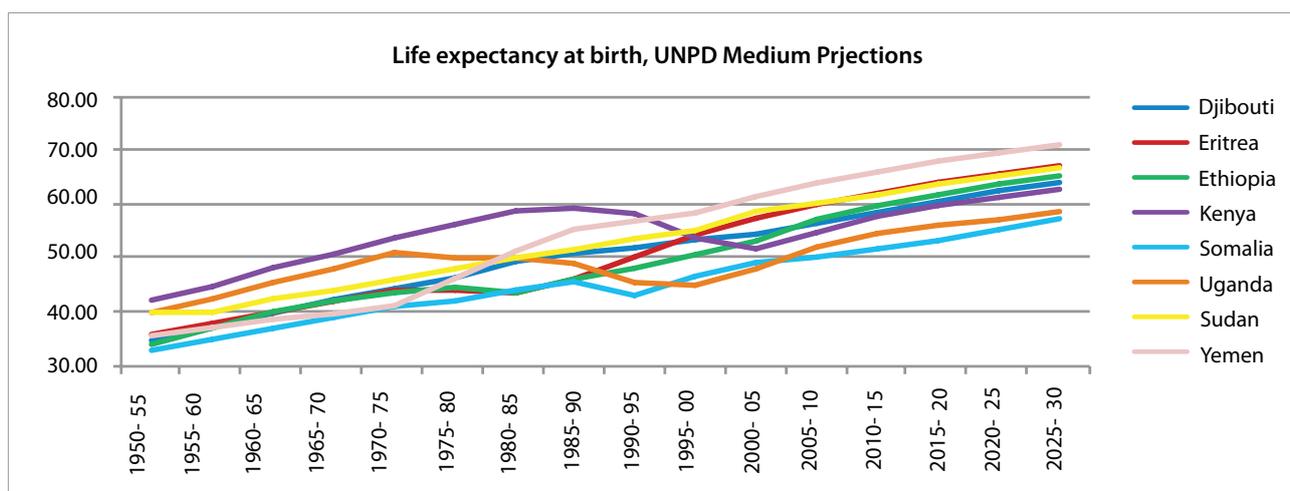
During the recent 2011 famine, an estimated 13 million people were wholly dependent on emergency food aid and emergency medical services. At present, many migrants and refugees are reporting to coastal monitoring teams working within the Yemen Mixed Migration Task Force and under the auspices of UNHCR,

⁴² FAO Country report Ethiopia <http://www.fao.org/docrep/004/ab582e/AB582E03.htm> accessed on 06 August 2012.

⁴³ Probability of dying between birth and exact age of five, expressed as deaths per 1,000 births.

⁴⁴ The average number of years of life experienced by individuals of a given population expressed in years.

Figure 8: Life expectancy at birth, UNPD medium projects



Source: United Nations, Department of Economic and Social Affairs, Population Division, Life expectancy at birth (for both sexes combined) medium projections, World Population Prospects: The 2010 Revision, CD-ROM Edition, 2011.

that they seek a better life in terms of livelihood opportunities, education *and* access to health care. Hence, for migrants in the region, health issues are part of the calculus to move.

As mentioned previously, malnutrition in infancy or childhood and a lack of access to portable water are critical aspects of poor health and 'failure to thrive'.⁴⁵ Hunger and malnutrition are seen as underlying causes of many diseases in the region. Chronic malnutrition weakens young children's immune systems, leaving them more likely to die of childhood diseases like diarrhoea, pneumonia and malaria. The malnutrition rate in Somalia currently stands at between 15 – 30 per cent among children, while in Yemen it stands at a staggering 58 per cent - the second highest in the world.⁴⁶ In Ethiopia, malnutrition is an underlying factor in at least half of all deaths of children under five.⁴⁷ In terms of insufficient access to clean water, the United Nations Children Fund (UNICEF) estimates that 65 per cent of the population in Somalia does not have reliable access to safe water throughout the year, while less than 50 per cent have access to adequate sanitary means.⁴⁸ Not only are there concerns about access to clean water, but there

are serious concerns about the future ability of towns and cities to supply clean water from their rapidly diminishing underground reserves, as, for example, in Yemen.

Education trends

Migration, education and employment are deeply intertwined processes. People migrate in pursuit of education and skills training and also to pursue employment opportunities that meet their higher levels of qualification. At the same time, people with lower skills are motivated to migrate to countries with economies that will give them higher returns on their labour. In the Horn of Africa and Yemen, all of these aspects of migration are represented.

The limited available data suggest that the growing populations in the region are increasingly literate (see Figure 9).⁴⁹ The only exception is Ethiopia, where adult literacy has stagnated over the past 30 years. In all other countries for which data are available, literacy levels are now above 50 per cent. Kenyan literacy is the highest with levels between 80 and 90 per cent. It seems relatively certain that literacy levels will further increase in the future, although the speed at which this will occur is difficult to predict.

45 See 'Failure to thrive', A.D.A.M. Medical Encyclopaedia. Refer to: <http://www.ncbi.nlm.nih.gov/pubmedhealth/PMH0001986/>

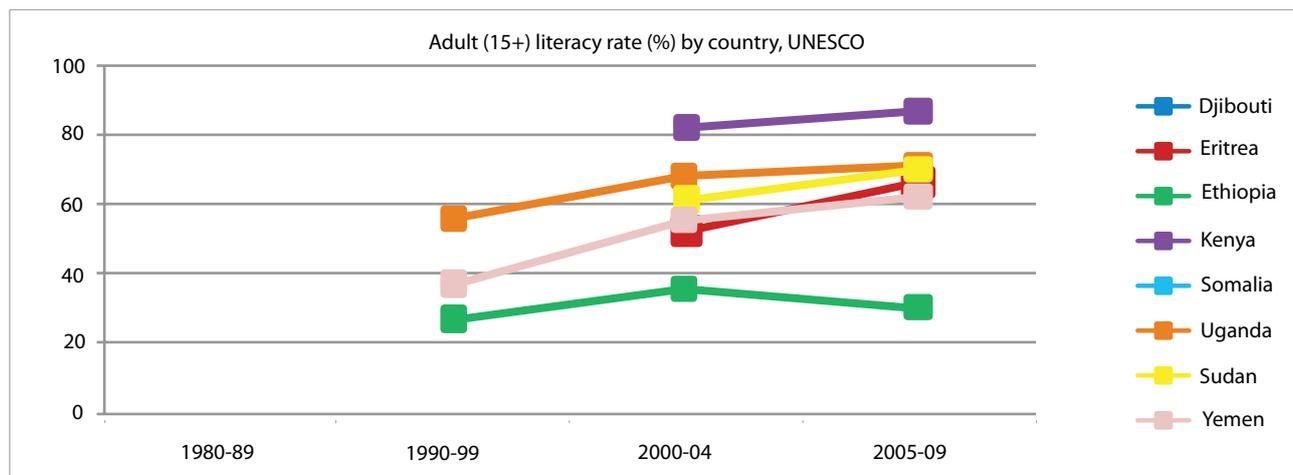
46 UN News January 2012. 'Unicef warns on high rates of malnutrition among children in Yemen.'

47 Government of Ethiopia (2007) 'Report on implementation of the world fit for children plan of action in Ethiopia.'

48 UNICEF Somalia; Water, Health and Sanitation Programme: <http://www.unicef.org/somalia/wes.html> accessed on 06 August 2012.

49 Literature reflects the percentage of population aged 15 years and over who can both read and write with understanding a short simple statement on his/her everyday life.

Figure 9: Adult (15+) literacy rate (%) by country, UNESCO



Source: United Nations, Educational, Scientific, and Cultural Organization, Adult literacy rate, UNESCO Institute for Statistics (UIS), 2012.

In addition to rising levels of education, the Horn of Africa continues to experience a steady rise in the number of technical colleges and universities that are broadening the scope of opportunities for students. In Ethiopia during the period 2006-2008, the education ministry launched 13 new public colleges and universities, which are serving an all-time high of approximately 53,000 undergraduates.⁵⁰ According to the United Nations Development Programme, 'Ethiopia lost 75 per cent of its skilled workforce between 1980 and 1991',⁵¹ and the International Organization for Migration finds there are more Ethiopian doctors in Chicago than Ethiopia.⁵² In Kenya in 2007, a Legal Order made provisions for 15 colleges to receive constituent affiliation with major public universities as a remedial measure to address the high demand for higher education.⁵³ Additionally, Kenyan public universities have been compelled to increase their enrolment numbers at the seven public and 27 private universities in the country.⁵⁴ Yemen

has also seen a rapid expansion in higher education. Higher education levels are likely to increase life aspirations and educated people tend to be more mobile, which in combination with a 'youth bulge' can create a significant migration potential. The extent to which this will translate into increased migration depends on economic and political opportunities within the region.

Figure 10 shows that the ratio of female to male secondary enrolment⁵⁵ is still skewed but improving in countries for which data is available, with the exception of Yemen, where overall increases have been small. Possible future increases in female education are also likely to increase life aspirations and capabilities of young women in the region, and this may prompt an increase in their mobility.

Although Kenya has a relatively high literacy rate, a high rate of unemployment among the youth has contributed to the decision of some to emigrate in search of opportunities, particularly to the United States and United Kingdom further afield and, to Tanzania and Uganda within East Africa.⁵⁶ Migration opportunities are not only for

50 Challenges of Higher education in Ethiopia, VOA 08, January 2008.

51 UNDP Administrator, Kemal Deris, said at the International Labour Organisation (ILO) 11th African Regional Meeting April 27th 2007 and quoted in 'Economic Impact of Brain Drain in Africa Estimated at US \$4bn Annually' online article accessed on September 12th 2012 at <http://www.wes.org/ewenr/07may/africa.htm>

52 OM (2005). 'Section 2: Costs and Benefits of Migration' in World Migration Report. IOM: Geneva.

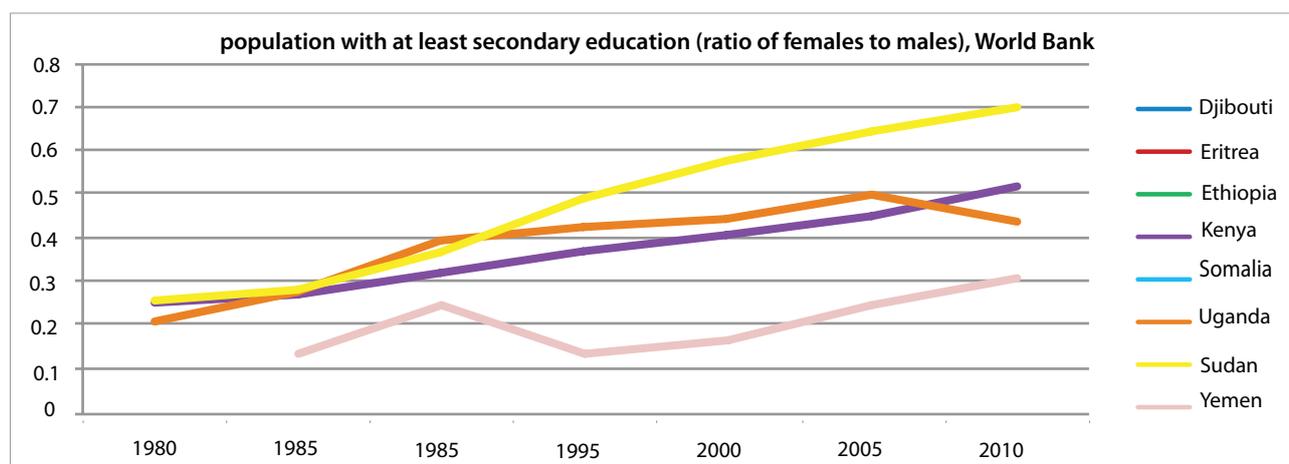
53 See the Kenyan Commission for High Education on the Status of Universities in Kenya, available at: <http://www.che.or.ke/status.html>

54 Ibid.

55 This the percentage of girls to boys enrolled at the secondary level in public and private schools.

56 See World Bank (2010) Migration flow data, available at: http://siteresources.worldbank.org/INTPROSPECTS/Resources/334934-1110315015165/T1.Estimates_of_Migrant_Stocks_2010.xls

Figure 10: Population with at least secondary education (ratio of females to males)



Source: Barro, R.J and J.-W.Lee, Population with at least secondary education, female/male ratio, 'A New Data Set of Educational Attainment in the World, 1950-2010', World Bank, NBER Working Paper No. 15902, 2011.

those with higher levels of education, of course. In countries that have lower levels of literacy like Ethiopia and Somalia, one finds a greater incidence of lower skilled migration. In the case of Ethiopia, the irregular migration of lower skilled workers is rising. A conservative estimate of irregular Ethiopian migrants and Somali asylum seekers crossing into Yemen in 2011 was 103,000.⁵⁷ Many of these migrants seek menial jobs, such as domestic work for women in the Gulf States and work on qat farms in Yemen.⁵⁸ Tens of thousands of other Ethiopians and Eritreans find work legally through recruitment agencies that send them overseas to supply the foreign labour markets, particularly in the Gulf States.

Urbanisation trends

Over a third of Africa's one billion inhabitants currently live in urban areas, but by 2030 that proportion will have risen to a half. Slum-dwellers currently account for 70 per cent of urban inhabitants. As fertility declines (especially in towns and cities) the vast majority of the growth will come from an influx of internal, rural and international migrants. Nairobi and Addis Ababa are in the top five fastest growing cities in Africa. In the period 2010-2025 Nairobi is expected to grow in population by approximately 78 per

cent, while Addis Ababa is expected to grow by over 62 per cent.⁵⁹

Across the region, there is significant construction of residential and commercial space underway, in some cases creating satellite cities and more exclusive gated communities. 'Secondary' or 'second-tier' cities (smaller cities and town) throughout the region are relatively certain to experience urbanisations. Second-tier cities include Nazret, Dire Dawa, Mekele, and Gonder in Ethiopia; Mombasa, Nakuru, Eldoret, Machakos and Bungoma in Kenya; Keren, Ādī Ugrī, Dek'emhāre, Nak'fa, and Āk'ordat in Eritrea; Ali-Sabieh, Arta, and Dikhil in Djibouti; and Baidoa and Kisimayu in Somalia.⁶⁰ Alongside this growth, urban disparities between high and low income groups are expected to continue to increase.⁶¹

At present, with the exception of Djibouti, countries in the region still have predominantly rural populations (see figure 11).⁶² Uganda and Ethiopia have some of the lowest urbanisation rates in the world with urban populations

⁵⁷ RMMS (2011, 2012)

⁵⁸ RMMS / DRC 2012 report, Desperate Choices (see bibliography)

⁵⁹ UN-Habitat (2010) 'The State of African Cities'.

⁶⁰ Rockefeller Foundation Horizon Scanning and Trend Monitoring Report Greater Horn of East Africa – June 2010 Greater Horn Outlook; see also Bakewell, O. and Jonsson, G. (2011) 'Migration, Mobility, and the African City', IMI Working Paper Series: Oxford.

⁶¹ Ibid.

⁶² Urban population is de facto population living in areas classified as urban according to the criteria used by each area or country.

accounting for less than 20 per cent of their total populations. This suggests that the region has a great potential in terms of possible future rural-to-urban migration, possibly spilling over in international migration. However, the pace at which this will occur is dependent on future economic growth, investment, and the development of urban-based industrial and service economies. The lack of development over the past decades explains the overall slow rate of urbanisation in countries in the region.

Conversely, the high economic growth rates sustained by Addis Ababa, Kampala and Nairobi have made these urban centres increasingly attractive to rural populations as well as worse-off regional neighbours. Movement towards successful fast-growing urban centres within Horn of Africa from internal and international populations may place considerable constraints upon urban and national authorities to provide basic services and security. In turn, such migration may constrain regional cooperation and collaboration agreements (that promote the free movement of goods, people and capital), as promoted by regional entities such as the East African Community, Inter-Governmental Authority on Development (IGAD), and the African Union.

In Yemen, urbanisation is also occurring at a rapid rate with an annual rate of change at almost five per cent (2010-2015 estimate). The annual population growth rate is approximately three per cent, with a predominantly young population in which approximately 46 per cent were under 15 years old in 2007. The relative certainty of increasing urbanisation rates, poor economic indicators, a large youth cohort and proximity to more economically prosperous neighbours, suggests that many Yemeni may be likely to migrate in the future.

Along the Eastern Seaboard of Africa, other fast growing urban centres like Dar es Salaam, Cairo and various cities in South Africa may also act as attractive destinations for migrants from the Horn of Africa and other regions.

Economic trends

Although it is impossible to predict future economic trends, we can learn from studying recent trends and comparing the region with economic levels and trends of possible destination countries. Figure 12 shows GDP per capita increasing, with the exception of Eritrea, which is stagnant and also the poorest country in the region. As the figure illustrates, almost all countries have experienced a relatively steep and steady rise since 2000 that looks to continue for the next few years. In all cases (apart from Eritrea) the value of the GDP in 2016 is estimated to be between 150 per cent and 250 per cent higher than 2000.

In terms of weight, Eastern Africa (including the Horn) accounts for approximately 26 per cent of Africa's population, 22 per cent of the continental landmass and 16 per cent of the combined GDP (using 2009 current prices). Over the last decade (2000-2009), economic growth has been strong in the region, with regional real GDP growth averaging 6.6 per cent annually. According to analysis from the African Development Bank, the East Africa Community, partner states and countries in the Horn of Africa demonstrated strong growth performance with 6.1 per cent and 6.9 per cent, respectively.⁶³ High growth rates continue in the region with Ethiopia maintaining a staggering 10-11 per cent annual growth rate in recent years. This is remarkable when compared to the economic downturn and recession that has affected most other regions in the world since 2008. Inflation has remained at a single digit level, real export growth rates have been positive, and external debt has been sustainable, while the debt servicing burden has been relatively low.⁶⁴

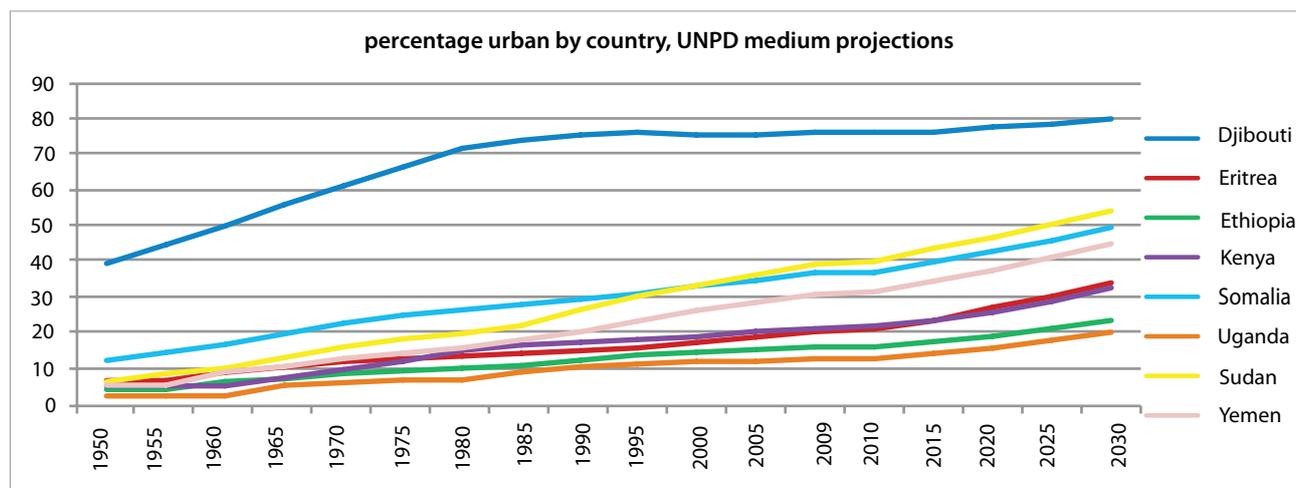
The prevailing view among many regional economists and other observers is that a more integrated Eastern Africa has great potential for trade expansion and poverty reduction.⁶⁵

63 African Development Bank (2010). Eastern Africa Regional Integration Strategy Paper 2011 – 2015 (Revised Draft for Regional Team Meeting) Regional Departments – East (OREA/OREB) October 2010. Online at <http://www.afdb.org/fileadmin/uploads/afdb/Documents/Policy-Documents/East%20Africa%20-%20Rev%20RISP%20.pdf>

64 Ibid.

65 Ibid.

Figure 11: Percentage urban by country



Source: United Nations, Department of Economic and Social Affairs, Population Division, Percentage urban medium projections, World Population Prospects: The 2010 Revision, CD-ROM Edition, 2011.

Regional GDP growth will be propelled by rising oil output in South Sudan, mineral exports in Ethiopia and Tanzania, and on-going trade and border control reforms to encourage ease of doing business across the region. Kenya is the regional trade hub and the transport link to the world for many of the countries and is the largest trading partner in the East African Community, which is judged to be the fastest growing regional market globally.⁶⁶ The USD 23 billion Lamu Port and Lamu Southern Sudan-Ethiopia Transport Corridor (LAPSSET) project is illustrative of the ambition, optimism and commitment to growth in the region. However, in terms of Foreign Direct Investment, Eastern Africa and the Horn had the lowest share out of the five African regions in 2008 and 2009, attributable to the civil conflict and governance challenges.⁶⁷ Eastern African countries had the lowest 'trade logistic perception' in the world in 2010, with cumbersome trade logistics along transport corridors, corruption, and time-wasting border procedures resulting in excessive delays and high transit costs.⁶⁸

Until recently many countries in the Horn of Africa and Yemen have consistently been ranked amongst the poorest nations globally in terms of income, GDP and human development

indicators. Eritrea, Ethiopia, Yemen and Somalia still do irrespective of recent economic improvements. Thus, it is relatively certain that the region will remain *comparatively* poor in the coming decades (see Figure 13), again indicating a significant migration potential. At the same time, we see significant and possibly growing differences within the region, which may generate intra-regional migration in the future. Nevertheless, several analysts are optimistic about the prospects for sustained growth⁶⁹ and if peace can be secured in South Sudan and Somalia, the region may secure a more sustainable upward economic trajectory.

Based on migration theory we can argue that any future economic growth in such poor countries is likely to increase emigration because it will give more people the resources they need to migrate, while economic gaps with destination countries will remain substantial for decades to come.

Telecommunication and infrastructure trends

The rapid recent spread of telecommunication technologies was widely recognised by project

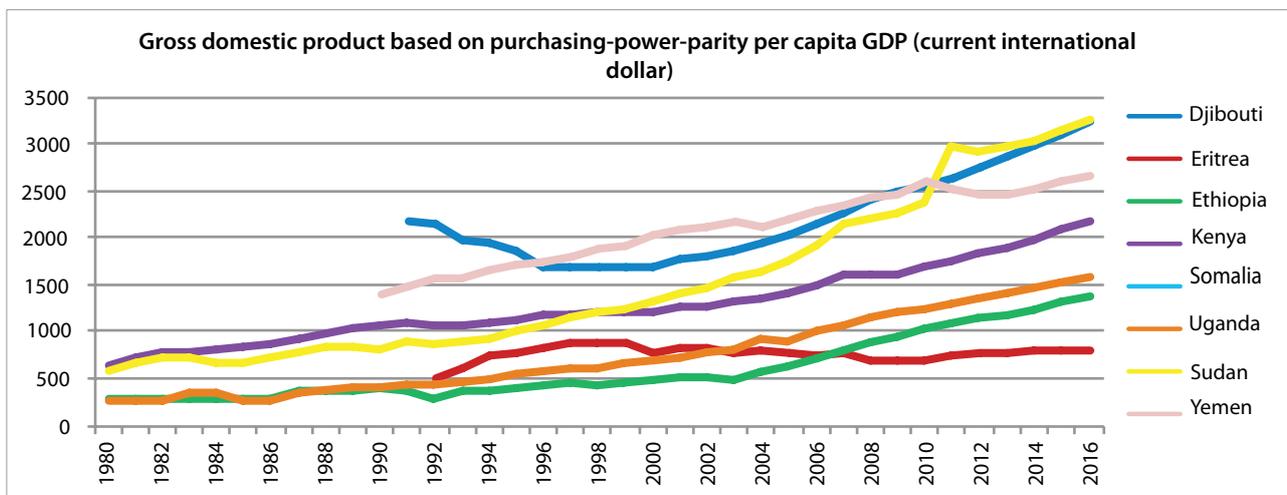
66 World Bank (2012) 'Kenya Economic update June 2012'. Accessed online September 12th 2012

67 African Development Bank 2010

68 Ibid.

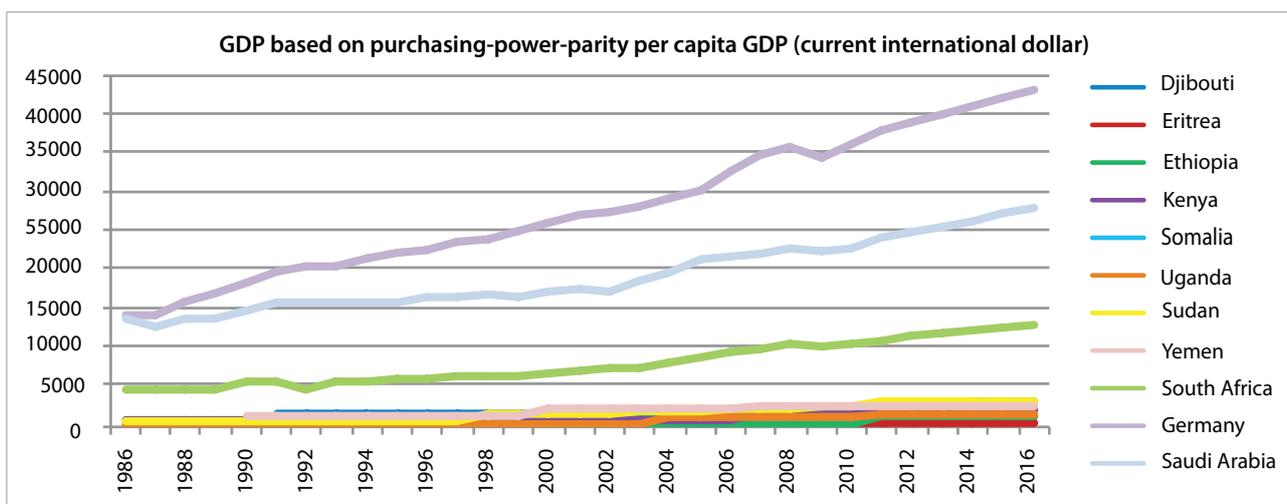
69 See for example, Africa Leadership Network (2012) 'Sub-Saharan Africa: Sustaining Growth Amid Global Uncertainty – International Monetary Fund'. Accessed at <http://www.africanleadershipnetwork.com/perspectives-share/sub-saharan-africa-sustaining-growth-amid-global-uncertainty-international-monetary-fund/>

Figure 12: Gross domestic product based on purchasing-power-parity per capita GDP



Source: International Monetary Fund, Gross domestic product based on purchasing-power-parity per capita GDP, World Economic Outlook Database, September 2011.

Figure 13: GDP based on purchasing-power-parity per capita GDP with referent countries



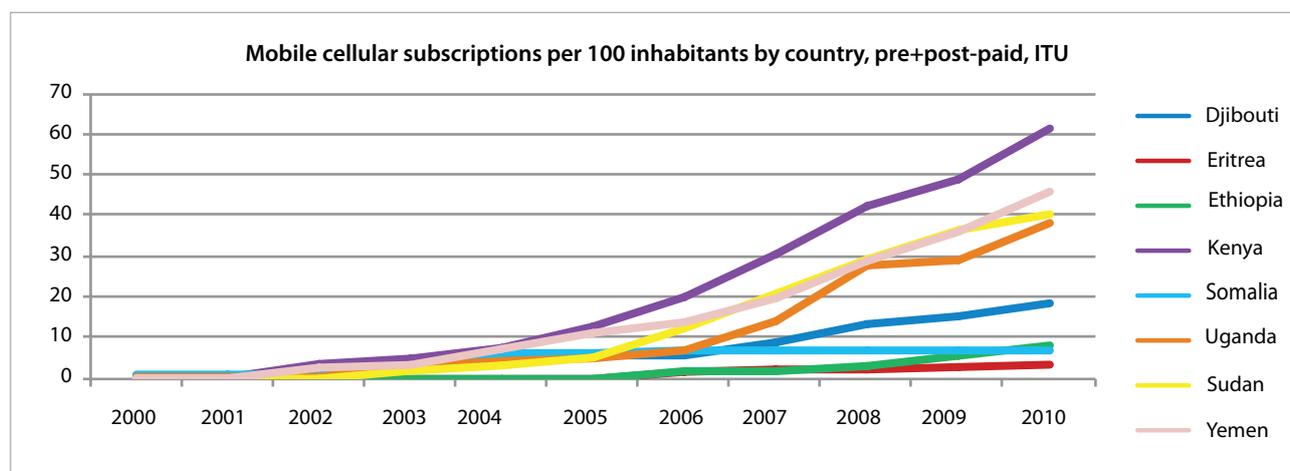
Source: International Monetary Fund, Gross domestic product based on purchasing-power-parity per capita GDP, World Economic Outlook Database, September 2011.

participants to be a significant and relatively certain trend into the future. As a region, official statistics (collated by the United Nation’s International Telecommunication Union) suggest that the Horn of Africa and Yemen is one of the least saturated telecoms markets globally with less than 25 per cent of the population having mobile subscriptions. Figure 14 shows that while mobile cellular subscriptions (per 100 inhabitants) have grown fast in most countries since 2000, there are clusters of faster and slower penetration rates. This is not surprising

as the global trends indicate that ICT penetration levels generally (i.e. Mobile Phones, Internet use and Fixed Telephones) are closely linked to ranking of regions and countries by the United Nation’s.

According to the data, Somalia, Ethiopia and Eritrea appear to be experiencing little growth in mobile subscriptions, while Kenya (at 61 subscriptions per 100 people in 2012) is experiencing growth that is considerably higher than other countries in the region. This seems

Figure 14: Mobile cellular subscriptions per 100 inhabitants by country, pre and post-paid, ITU



Source: International Telecommunications Union, Mobile cellular subscriptions per 100 inhabitants, 2011.

to reflect Kenya's (and, particularly, Nairobi's) position as the main regional communication, transport, and migration hub. Despite the low level of mobile subscriptions and penetration relative to population, the actual growth according to official statistics is significant: in the five years between 2005 and 2010 subscriptions rose in Yemen by 400%, in Ethiopia by almost 1400% and even Eritrea, where government policy discourages uptake, the growth was approximately 300%.

However, subscriptions do not reflect actual ownership, for which precise information is difficult to ascertain. Mobile penetration figures are based on SIM cards sold, not on the number of users or the number of cell phones distributed. For instance, one subscriber may have multiple and/or inactive SIM cards or many people may share one SIM card; shared access is particularly common in poor and/or rural communities where an entire village may have access to one or two phones.⁷⁰ Somalia is a good example where the official figures indicate that less than seven people per 100 have mobile subscriptions, while contact with Somalis and Somali communities suggest the actual access and usage is many times higher. In 2009, three of the largest firms, (Hormuud Telecom, Nation Link and Telecom Somalia) had a combined 1.8 million mobile

users (of a population of nine million) who enjoy some of the world's most inexpensive calling rates.⁷¹ Figures can also be distorted when subscribers using a mobile registered in one country then use it in another. For example, a subscriber from Nairobi uses his/her mobile in Mogadishu. Reportedly, Safaricom (a Kenyan based mobile provider) has an estimated 30 per cent penetration rate in South-Central Somalia with seven local providers.⁷²

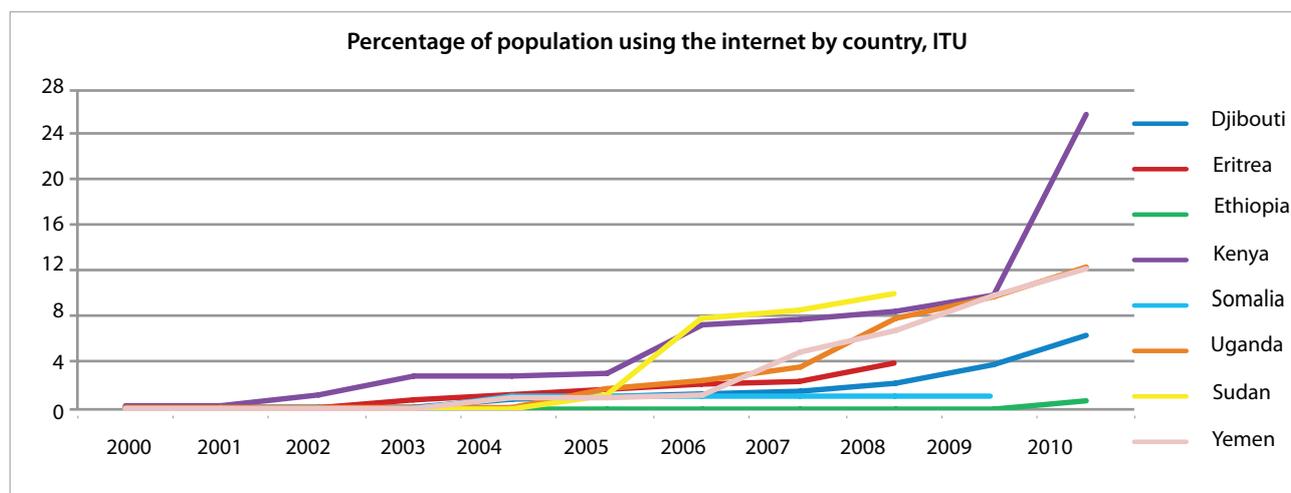
Figure 15 shows that Kenya's internet usage significantly outranks other countries in the region. In fact, less than 15 per cent of populations in the remaining countries are using the internet. Thus, there is great potential for future increases. The same accounts for satellite television. Such trends appear to be linked to improved transport (road, air, and sea) connections and the spread of other services, such as mobile phone banking (M-Pesa in Kenya since 2007) and remittance services. While mobile phones enable and facilitate the process of migration, improved telecommunications in the region has also facilitated the exploitation of mixed migration flows. In recent years there has been a rapid rise in the number of reported cases

⁷¹ As quoted in Reuters news article: <http://af.reuters.com/article/investingNews/idAFJ0E5A20DB20091103>

⁷² According to direct communication between RMMS and Safaricom Kenya.

⁷⁰ UNDP (2012). 'Mobile Technologies and Empowerment: Enhancing human development through participation and innovation'.

Figure 15: Percentage of population using the internet by country, ITU



Source: International Telecommunications Union, Percentage of population using the internet, 2011.

of migrants from the Horn of Africa who have been kidnapped and held for ransom in Sudan, Egypt and Yemen. The demands and transfer of ransom funds are facilitated by mobile phones. Restrictive policies in some countries, such as Eritrea, make it difficult to subscribe to mobile connectivity. Some regimes strictly regulate the market for their own benefit and political control, like Ethiopia for example, where several internet cafes have been closed down by the government in the past and the overall speed of service and coverage appear to have been restricted.⁷³ However, the Ethiopian government has been making attempts to remove these restrictions and invest in projects that are aimed at increasing accessibility to the internet, which may explain the slight rise in users (Figure 15). Both Ethiopia and Eritrea have been countries of origin for some of the largest mixed migrant flows in recent years.

Political stability and government support have also made some countries in the region, such as Kenya and Uganda, more attractive for

competitors to introduce mobile and internet services, driving costs down and the number of subscribers up. As a result, people with low income in rural areas are increasingly able to afford mobiles.

The effect of improved telecommunication on migration is ambiguous. On the one hand, it is likely to increase people's knowledge of opportunities elsewhere and, hence, increase their aspirations to migrate. It may also increase people's capabilities, by improving the way they engage in business and manage their resources, and even learn. Some NGOs⁷⁴ are working towards increasing school children's access to telecommunication technologies, which may equip them with valuable skills needed in their labour market, but may also prepare them for labour skills needed abroad. Information and telecommunication technologies also increase contact with the diaspora or friends and relatives who have already migrated and facilitate the transfer of remittances in times of need. They can be important sources for information that help reduce risk and uncertainty for those thinking of migrating. At the same time ICTs can alleviate the need or desire to permanently migrate, and therefore have a migration-reducing effect.

⁷³ For news reports on government's restriction of voice-over-the-internet and internet usage, see, for example: <http://www.abugidainfo.com/index.php/18647/>, <http://www.ethiopianreview.com/content/41411> and <http://www.ethiopianreview.com/content/38798>. See also the reasons for the lack of technological development in Ethiopia's profile in World Economic Forum's 2012-2013 Global Competitiveness Report: http://www3.weforum.org/docs/WEF_GlobalCompetitivenessReport_2012-13.pdf.

⁷⁴ See for example, SNV, the Netherlands Development Organisation working with One Laptop Per Child from the USA. E-learning is increasingly part of Kenya's educational strategy.

Technology may facilitate non-migratory mobility, such as short business trips or commuting, which may counterbalance the migration facilitating role of technological advances. It is also important to note that ICTs may be a means through which migrants abroad act as 'gatekeepers' trying to dissuade their kin in home countries from migrating and communicate misinformation.⁷⁵

Political futures

The analysis of past and present migration patterns and megatrends, as well as the scenario building workshop revealed the crucial importance of political factors for understanding migration, particularly in this region. While it is impossible to predict how modes of governance (democratic or authoritarian) will evolve in the next decades, a few general political factors seem relatively certain. Participants expected an increasingly diverse array of foreign actors (countries, businesses, and organizations) in the region, continuing and possibly expanding the present trend of growing Chinese (and Indian) economic investment. This is partly a function of the geopolitical significance of the region and the presence of oil reserves in Sudan, Kenya, and Uganda and natural gas reserves in Sudan, Ethiopia, and Somalia. Participants also felt that political instability and conflict was likely to continue over the next 20 years, although how and to what extent it would continue, participants did not agree upon.

The impacts of political trends on migration are uncertain, although political instability and conflict are likely to be accompanied by continued refugee and IDP flows and act as a driver (as it does at present) of mixed migration. Clear attribution of drivers that cause migration are not always obvious when political pressures combine with economic and possibly social pressures. Future migration is likely to remain mixed, with people often using the same routes, but moving for multiple, different, and

changing reasons and having different statuses (according to international refugee law and national immigration laws, etc.) as they move.

Conclusion

Demographic, health, education, technological and infrastructural, urban, and political trends are difficult to predict, but the exploration of the megatrends presented here indicates with relative certainty an increase in the migration capabilities and aspirations of people in the region, migrants and forced migrants alike. This is because even under the most optimistic scenarios of high growth, political stability, and democratisation, development gaps with other parts of the world will remain high. If factors such as border controls and restrictive immigration policies persist or intensify, and if the level of corruption and collusion between smugglers and state officials remains high, it is possible that much of the future migration will be irregular and place migrants and forced migrants in precarious and liminal states.

⁷⁵ Paul, A. (2011) 'Differentiated Social Capital Mobilization in the Migration Decision', Paper presented at 'Migration: A World in Motion: A Multinational Conference on Migration and Migration Policy', University of Maryland.

Section 5: Key uncertainties for future mixed migration in the Horn of Africa and Yemen

Using their expertise on the region and on migration and forced migration issues, workshop participants identified the factors in the table below as having the potential to significantly affect future mixed migration drivers and patterns in the Horn of Africa and Yemen, but being relatively ‘uncertain’ in terms of their future outlook, given the lack of knowledge and data about them. In developing this list, experts and stakeholders had to reach a consensus about the plausibility of each factor. The process of debating and reaching consensus about uncertainties prompted experts and stakeholders to question trends and factors that they had previously believed to be certain. By learning what factors each other held to be uncertain, new ideas arose about future uncertainty and its implications for mixed migration outcomes in the region. This process also motivated participants to consider how various uncertainties might interact with one another and/or with the megatrends discussed in the previous section to yield migration outcomes.

Examining the factors that are the *most uncertain* and have the *highest potential to impact migration* is a fundamental feature of the scenario methodology, and a crucial component of future planning, for it is the ‘uncertain’ factors for which experts and stakeholders tend to be the least prepared. This is because experts and stakeholders tend to assume that uncertain factors will mimic the *status quo*, or that uncertain factors are too unpredictable or controversial to consider. However, it is relatively certain that the political, economic, social, technological, and environmental climate will deviate from present conditions in the next 20 years. It is therefore important that governments, international organizations, and other institutions working on issues of voluntary and forced migration consider what they can do to position themselves to be prepared for future relative certainties and uncertainties, to ensure the fulfillment of their institutional objectives.

This section presents the more than 50 uncertainties identified by experts and stakeholders during the project’s scenario-building workshop. It discusses a selection of these uncertainties in-depth and explores their implications for future mixed migration in the region: changing economic contexts and regional economic integration, changing labour markets, xenophobia, environmental change and variability, conflict and political instability, diasporas and remittances, and migration and forced migration policies. The scenarios presented in the final section of this report integrate these uncertainties and demonstrate that depending on how they take shape and interact, different futures and consequences for migration may result.

Changing economic contexts and regional economic integration

The evolution of the economic situation in the Horn of Africa and Yemen is highly uncertain in the longer term (up to 2030). Many parts of Africa, including East Africa and the Horn of Africa, are experiencing a period of economic growth and increased trade. Kenya, Ethiopia, Djibouti and Somaliland are enjoying relatively high levels of economic growth. Trade between countries in East Africa and the Horn of Africa has multiplied rapidly in recent years, with Kenya being the main player. Revenues from oil exploitation in South Sudan and new discoveries in Kenya’s Turkana region and parts of Somalia, combined with significant investments in infrastructure by governments in the region, private businesses, and external powers, particularly China, suggest that the new wealth from extractive industries will be an important and possibly transformative aspect of the region’s economy in the future. However, this assumes that the countries involved do not succumb to the ‘resource curse’ that has been observed elsewhere, leading to increased socio-economic inequality, economic and political destabilisation and conflict or the consolidation of authoritarian regimes.

Ports in Djibouti and Mombasa, Kenya are pivotal entry points handling a rapidly increasing quantity of incoming goods. Kismayo port in Somalia, even under the control of non-state

Uncertainties in the Horn of Africa and Yemen in 2030 – Nairobi Scenario Building workshop, April 2012		
POLITICAL	ECONOMIC	SOCIAL
<u>International</u> European integration/ fragmentation Outcome of Arab Spring Political stability in Great Lakes <u>Regional</u> Ethiopia/Eritrea relations Sudan/S. Sudan relations Somalia/Kenya/Ethiopia relations Regional political integration <u>Intra-state</u> Political stability + conflict Presence of rebel + armed groups Democratic v. dictatorial gov. Centralised v. decentralised gov. Strength of civil society Respect for human rights Presence of international organizations Migration + forced migration policies	<u>International</u> Shift in powerful global economies Foreign aid Foreign investments + trade Global commodity prices Global labour demand Economic outlook of Gulf countries Remittances from diaspora <u>Regional</u> Work permits + trade agreements Regional economic integration <u>Intra-state</u> Economic growth Economic inequality Employment rates Service sector industry Natural resource industries Ethiopian economic liberalisation	Social relations Presence of pastoralism Social inequality (esp. class + ethnic) Gender inequality Xenophobia + integration Religious institutions + networks Social services Access to/quality of healthcare Improvement in public health Family planning services Access to/quality of primary + secondary education Growth of tertiary education Access to welfare
DEMOGRAPHIC*	TECHNOLOGICAL	ENVIRONMENTAL
Urban growth management Declining mortality* Increasing life expectancy* Rate of population growth*	Agricultural technologies Transport + infrastructure Health care technologies Remittance technologies	Environmental variability Land fertility Clean water access Natural disaster vulnerability Natural resources (oil, gas, water)

*While many demographic factors tend to be relatively certain, some workshop participants argued that in the Horn of Africa and Yemen, demographic factors should be considered 'uncertainties' because of their dependence on political stability, conflict, and economic investment.

actors, enjoys a booming rise in income and transactions, particularly from the import of relatively inexpensive goods. In contrast, Yemen and Eritrea have stagnant economies and future economic growth will depend much on political stability. Similarly, it is uncertain whether Somalia as a whole will completely recover from two decades of conflict and the absence of government within the 2030 timeframe explored by this project's scenarios. There is evidence that Mogadishu is currently experiencing a

construction boom,⁷⁶ and many observers agree that if peace and political stability can be maintained, Mogadishu may once again become an important and thriving commercial hub and port.

⁷⁶ See, for example: http://www.upi.com/Top_News/Special/2012/06/23/Violence-waning-Mogadishu-experiences-building-boom/UPI-14901340444475/, <http://mmtimes.com/2012/business/627/biz08.html> and Saferworld report 'Mogadishu Rising?' Available at: <http://www.saferworld.org.uk/downloads/Mogadishu%20rising.pdf>

The regional integration of the Horn of Africa economies is another highly uncertain – yet highly significant, in the context of migration – factor identified by experts and stakeholders through scenario-building exercises. Presently, several regional governmental bodies appear to be promoting greater integration in the Horn of Africa (and throughout Africa). Kenya and Uganda are both members of IGAD and the revived East Africa Community and all IGAD states barring Somalia are also members of COMESA. However, it is uncertain whether these bodies will be able to foster regional economic (and perhaps political) integration. Some experts argue that they ‘reflect competing yet ineffectual economic integration blueprints. IGAD’s revived emphasis on economic integration also risks being perceived as largely donor driven’.⁷⁷

Deeper regional integration and interdependence is likely to raise the opportunity cost of going to war and hence, may decrease the likelihood of regional conflict. Forced migration in such a scenario would therefore be less likely. As mentioned previously in Section 3, the link between development and security is highly relevant to issues of mixed migration in the Horn of Africa and Yemen, as a reduction in conflict and political instability and the alleviation of economic crises may prompt greater regional and international (primarily labour) migration, as people’s capabilities and aspirations to migrate are likely to increase. This can lead to an increase in both authorised and irregular migration flows. Additionally, if greater regional economic integration takes place, internal trade and prosperity in the region may increase as border controls, tariff reductions and regional infrastructure would become more standardised, modernised and efficient. As mentioned previously, migration research suggests that trade and capital flows tend to be complements, rather than substitutes of migration. Hence, greater integration may prompt greater regional labour migration and trade-related mobility.

Sustainable economic growth may have various impacts on mobility. Economic growth in some

parts of the region would likely prompt a rise in the demand for labour and attract migrants from other countries (and potentially, regions). Equally, more prosperous and educated people may develop increased aspirations and capabilities to migrate within and outside of the region, particularly in the case of skilled workers and students. Conversely, if economic growth falters, becomes erratic, is highly unequally distributed, or reverses while population growth and high unemployment continue, it is possible that the region will witness a continuation of more irregular forms of migration and, for those in more economically vulnerable circumstances, involuntary immobility.

Changing regional and international labour markets

The megatrends analysed in this report, including issues related to economic development, demographic change, advances in education and urbanisation suggest there will be important changes in the type of labour demand and supply in the future, although the extent and direction of such changes are highly uncertain. Manufacturing, construction and infrastructure may absorb high numbers of workers, should these sectors expand and prosper in countries in the Horn of Africa and Yemen. Additionally, modern extractive industries (mainly oil, natural gas and minerals, but also hydroelectricity production), which have the potential to thrive in the future, are now ‘high tech’ and employ a relatively small number of skilled workers. However, there may be substantial indirect benefits and dependent services that profit from the growth of these sectors. Furthermore, as skills and education increase in the region, it is possible that more international companies may use the region for offshore outsourcing, thereby increasing labour demand.

Historically, the lure of capital and employment opportunities in relatively prosperous nations in the Arab states of the Gulf, Israel, Europe, North America and Australia have been primary drivers of higher and lower-skilled migration from the region. The ‘brain drain’ (human capital flight) from Africa is estimated by the International Labour Organization to be between 10 and 30

⁷⁷ Chatham House. (March 2009). The Economics of Conflict and Integration in the Horn of Africa (Summary record of a half-day workshop at Chatham House) Quoting Dr David Styan, Lecturer in Politics, Birkbeck, University of London.

per cent of tertiary educated individuals. One study estimates that approximately 75 per cent of Ethiopia's skilled professionals have left the country in the last 10 years.⁷⁸ It is often believed that the health sector is one in which the loss of highly skilled workers is felt most acutely. However, migration scholars have contested this common assumption by showing that healthcare staff would not have been working in domestic healthcare sectors had they stayed in their home countries.⁷⁹ Aside from better opportunities elsewhere, conflict and political instability are other major emigration drivers. After two decades of civil war and instability, more than one million Somalis presently live outside their homeland as refugees, according to the UNHCR's 2011 Global Report on Somalia.

Should present trends continue and rural economies decline and the fragility of pastoralist communities increases, combined with the relatively certain trends of increasing populations and growing youth cohorts, the Horn of Africa and Yemen could experience larger numbers of young people looking for work in the future. It is uncertain whether potential future economic growth would sufficiently increase the demand for such a pool of labour. This issue is of particular relevance to migration, for, as mentioned previously, labour market dynamics often shape migration flows. For example, high unemployment across the Organization for Economic Co-operation and Development (OECD) states following the global economic crisis (2008 onwards) led to a limited reduction in immigration flows through 2010 and 2011. In contrast to the modest, crisis-related decrease in migration to the OECD region, the number of international students continued to increase, with more countries looking to students as a source of permanent migrants. Migrants in the OECD region continued to be particularly affected by the economic crisis, with increases in their unemployment rate, which is typically

greater than the unemployment rate for the native-born population.⁸⁰

With the increase in authorised and irregular migrants leaving the Horn of Africa and Yemen in search of better livelihoods, global economic trends may not be impacting movements out of the region to the same extent observed elsewhere in the world, given the significant development gap that persists between the region and its neighbours. For example, approximately 103,000 asylum seekers and irregular migrants, mainly from Ethiopia and Somalia, reached Yemen in 2011 – a record high for the region. Many of the irregular migrants may attempt the journey through Yemen to reach the Gulf or attempt the journey to Europe because opportunities for livelihood improvement are better in these regions than the Horn of Africa and Yemen.

Additionally, the changing demographic and labour profile in more developed countries suggests there may be a high future demand for migrant workers in certain sectors (e.g. unskilled factory work, the care industry, construction, cleaning and transport). This is a relatively certain trajectory based on a variety of demographic, social and technical realities as well as the current migration patterns observed in Europe and North America. Continued economic growth, changing social norms and reductions in welfare provisions in Europe and North America may generate a strong pull for migrants from the Horn of Africa and Yemen region, whose labour may fill shortages of domestic and care workers. Whether migrants from the Horn of Africa and Yemen will fill these labour gaps is not certain as it is contingent on other processes and factors.

Xenophobia

Public (in)tolerance and xenophobic government discourse and policies in relation to mixed migration in the region are highly

78 According to a November 2011 study presented at the National Symposium on Ethiopian Diasporas, Ethiopia by Canadian scientists led by Edward Mills.

79 Clemens, M. (2007) 'Do Visas Kill? Health Effects of African Health Professional Emigration'. Center for Global Development Working Paper No. 114; iHEA 2007 6th World Congress: Explorations in Health Economics Paper. Available at SSRN: <http://ssrn.com/abstract=980332> or <http://dx.doi.org/10.2139/ssrn.980332>

80 New Zealand Department of Labour (2011) 'Migration Trends Outlook 2010-2011'. Migration Research, Labour and Immigration Research Centre. Available at: <http://www.dol.govt.nz/publications/research/migration-trends-1011/migration-trends-1011.pdf>

reactive to economic and political factors and vulnerable to political manipulation. This makes it very uncertain how xenophobia will evolve in the future. Regional agreements promoting integration hold the free movement of people, capital and goods as key elements (e.g. East African Community, IGAD and African Union agreements); however, these elements have not been integrated into national immigration policies and policing.

It is highly uncertain whether future laws and policies concerning migration and integration introduced by governments and enforced by police would serve to encourage or discourage tolerance and acceptance in the medium or long term, given that a combination of xenophobia and racism has found expression in the region's popular politics and government policies in the recent past. For instance, in claiming that 80,000 Ethiopians were settled illegally in Somaliland, in late 2011 the Somali government issued an expulsion order requiring Ethiopians without sufficient documentation to exit within one month. Following the order, many Ethiopians encountered persecution and harassment by authorities and some were forced out of their jobs and homes.

In Yemen, because of the recent reports of kidnapping, torture and extortion surrounding Ethiopian migrants, authorities are portraying migrants as the cause of and reason for increased criminality. Additionally, in Djibouti, following a threat from the Somali rebel group, Al-Shabaab, reacting to the government's contribution of soldiers to the African Union force in Mogadishu in 2012, Djiboutian authorities attempted to prevent young, male Somalis entering the country as economic migrants, refugees or asylum seekers.⁸¹

Apart from official censure of undocumented foreigners (often referred to in the local media as 'illegals'⁸²), the criminalisation of irregular migrants by authorities and the general public can also be a source of xenophobic sentiments

and actions. In Yemen, although normally treated with considerable tolerance and afforded *prima facie* refugee status, the negative attitudes expressed towards Somalis by some officials and members of the public increased following the murder of a Yemeni army general - allegedly by a Somali suicide bomber.⁸³ In Yemen and Kenya some voices are calling for Somalis' refugee status to be revoked and for refugees to be returned. If peace returns to more parts of Somalia, it is possible that voices advocating for return could become louder.

Migrants are frequently depicted in the media and politics as undesirable, 'stealing' jobs and therefore unwanted, while at the same time, employers within the informal and formal economies have been eager to hire migrant workers. This is a common paradox and is also evident in the Horn of Africa and Yemen. It remains highly uncertain how future xenophobia in the Horn of Africa and Yemen will affect the experiences and aspirations of migrants and forced migrants in the region, and how this may affect future migration.

Environmental change and variability

Environmental change and variability will affect future migration through its influence on a range of economic, social and political drivers which themselves affect migration. However, the way in which environmental factors will affect migration drivers and lead to various migration outcomes depends on the future developments of the migration drivers, themselves, and is therefore highly uncertain. Environment and climate scientists foresee an increase in the frequency and severity of extreme weather events like droughts and floods in the future in the Horn of Africa.⁸⁴ The Horn of Africa is a region that already experiences low rainfall and high variability, with central Ethiopia and southern Kenya being less vulnerable owing to higher elevations.⁸⁵ It

81 Regional Mixed Migration Secretariat analysis based on various communications with field organisations.

82 See reporting of the Daily Nation, for instance.

83 See BBC Middle East news report: <http://www.bbc.co.uk/news/world-middle-east-18483785>

84 Houghton, J. (2008: August 31) '20 Years of IPCC Working Group I Assessment'. Presentation at the 20th anniversary of the IPCC: Geneva.

85 Gommes, R. and Petrassi, F. (1996) 'Rainfall Variability and Drought in Sub-Saharan Africa', FAO Agrometeorology Series, Working paper No. 9.

is important to note that low rainfall does not necessarily lead to agricultural drought, as this depends on a number of non-climate related factors, particularly the nature and efficiency of water management systems which affect water demand and scarcity. The region relies heavily on rain-fed agriculture, and, as a result, without the introduction of modern water management systems, continued temperature and rainfall variations may make crop yields equally variable and insecure.

While people who enjoy sufficient resources and access to infrastructure to develop land and water management systems are more resilient to environmental change and variability, large sections of the population in the Horn of Africa lack such resources. In such circumstances, migration to cities or further afield may be the optimal coping mechanism or positive adaptation strategy to environmental stress and uncertainties.⁸⁶ In Yemen, a combination of unfavourable environmental conditions and ineffective agricultural policies has fueled dependency on food imports. Under unfavourable conditions, and in the absence of efficient agricultural policies, it is possible that countries such as Ethiopia may experience similar circumstances.

Without effective land and water management, environmental change and variability may sustain or increase environmental fragility and exacerbate existing social and political tensions. Under certain circumstances, this could act as an indirect driver of migration. However, some analysts argue that the impact of environmental change and variability on migration is complex, indirect, and may not result in large-scale movement away from fragile areas because other countervailing forces and people's resilience and adaptation.⁸⁷ The 2011 report for the UK government found that millions of people will be unable to move away from locations in which they are extremely vulnerable to environmental change. *'To the international community, this 'trapped' population is likely to represent just*

*as important a policy concern as those who do migrate. Planned and well-managed migration can be one important solution for this population of concern. Preventing or constraining migration is not a 'no risk' option. Doing so will lead to increased impoverishment, displacement and irregular migration in many settings, particularly in low elevation coastal zones, drylands and mountain regions.'*⁸⁸

Conflict and Political instability

International and internal conflict and political instability have long continued to characterise the Horn of Africa and Yemen, making a future scenario of peace and stability difficult to imagine for many. However, the scenario methodology emphasises that it is the uncertain and seemingly most unlikely factors for which stakeholders tend to be least prepared. Thus, it is crucial to take these factors into account in scenarios development, since the impact of future peace and human security on mixed migration in the region would be vast.

A brief overview of select conflicts and political tensions illustrates the scale of this uncertainty: the non-violence between Eritrea and Ethiopia seems to be fragile as both renege on the Algiers agreement that ended the 1998-2000 war by refusing full troop withdrawal from contested areas. In Ethiopia, the Tigray-led authoritarian government has marginalised other ethnic groups, associating them with political opposition. Somalia has been without government for over two decades as warlords and rebel groups have vied for power through violent conflict. Protracted conflict in Somalia has increasingly impacted its regional neighbours. In late 2011, the Kenyan military invaded the country and joined African Union troops in support of the transitional government. Given entrenched clan-based differences, the pervasive strength of the war economy, and the continued presence of Al-Shabaab, it is very uncertain whether the presidential elections held in August 2012 will bring sustained peace and governance to the country.

⁸⁶ Foresight (2011). 'Migration and Global Environmental Change: Future Challenges and Opportunities'. Government of United Kingdom.

⁸⁷ Ibid.

⁸⁸ Ibid.

Sudan continues to be embroiled in violence in Darfur, causing displacement into Chad, and tensions persist between Sudan and South Sudan, which are characterised by open confrontation over the contested oil producing regions of Abyei and Heglig. Within South Sudan, inter-ethnic violent conflict periodically breaks out and prompts displacement. Kenya is still feeling the effects of the 2007-8 post-election violence that claimed the lives of over 1,200 and left up to 500,000 internally displaced, some of whom have yet to return.⁸⁹ The country is now preparing for the election in 2013 and it is uncertain whether this next election will result in political instability and conflict. Lastly, Yemen has endured several civil conflicts over recent decades – in the 1960s with the North Yemen Civil War, 1980s with the South Yemen Civil War, and 1990s with the South/North Civil War, as the northern and southern territories of the country have struggled for unity or division. More recently, political instability in Yemen, precipitated by the ‘Arab Spring’ led to outbreaks in violence as the regime of President Abdullah Saleh struggled to retain power for over a year in 2011/12.

Despite past and present instances of conflict and instability, the region may be witnessing ‘weak signs’ of change. As mentioned previously, some countries in the Horn of Africa and Yemen are experiencing high levels of economic growth and improving levels of human development. At the same time, elections in Kenya, Uganda, and Somalia may suggest a slow but steady trend towards democratisation. If such political and economic trends continue, a future Horn of Africa and Yemen marked by greater political stability and peace is possible.

A more politically stable and peaceful region could have various consequences for migration, including the return, or onward, ‘voluntary’ migration of refugees and internally displaced people. Alternatively, in instances of protracted conflict, refugees and IDPs might have integrated into host communities and prefer to remain in their new homes. Increases in peace

and political stability could also empower people who were previously constrained by insecurity to migrate. Moreover, the region may attract migrants and asylum seekers from neighbouring countries and regions. On the other hand, should conflict and political instability persist, countries in the region may experience continued and new forms of internal, regional, and international mixed migration, adding to the existing number of displaced people in the region. Additionally, those who are particularly vulnerable may become involuntarily immobile.

Diaspora and remittances

Sizeable migrant communities from the Horn of Africa and Yemen can be found within the region, in the Gulf States and further afield in Europe and North America. According to the World Bank 2010 data on migration stocks, the size of these communities has grown rapidly between 2000 and 2010 with the Ethiopian diaspora doubling in size and the Eritrean diaspora growing over 150 per cent over the same decade. The establishment of large diaspora communities since the 1960s has facilitated further migration through migrant network connections. Increasingly studied in the migration literature is the role that such network connections may also play in discouraging migration, by communicating misinformation.⁹⁰ The way in which diaspora communities shape future migration flows may therefore vary and remains uncertain.

Some observers argue that diaspora communities from the region increasingly engage in the political affairs of origin countries. In Puntland, Somaliland and South-Central Somalia, emigrants have returned to Somalia where they are fully engaged in political life and at times gain prominent political positions. The former Somali Prime minister Dr. Abdiweli Mohamed Ali (2011-2012) initially became involved in Somali activism while residing abroad. It should not be assumed that economic and political activism of the diaspora will be a source of future stability in the region. The possible emergence of political figures from the diaspora may lead to internal

⁸⁹ Ndung'u, J. and M. Wepundi (2012) 'Transition and Reform: People's Peacemaking Perspectives on Kenya's post-2008 political crisis and lessons for the future.' Report. Saferworld. Available at: <http://www.saferworld.org.uk/downloads/pubdocs/Kenya%20PPP%20report%20reduced.pdf>

⁹⁰ Paul 2011

struggles and contestation for power between individuals who have always resided in the origin country and economically-advantaged diaspora members. The involvement of emigrants or return migrants in politics in the region can be a stabilising or destabilising force, depending on the background and agendas of such political figures and the specific context.

Although exact figures are unavailable, according to some, an estimated 1.3-2 billion USD is remitted to Somalia from around the world annually.⁹¹ The U.S. Treasury Department estimates that remittances from American Somalis total \$100 million per year and has served to shield many from hunger and starvation. The 2008 UK Department for International Development survey on UK Somali remittances estimated that 40 per cent of all households in Somalia rely on remittances and the figure is higher for the urban population, two-thirds of whom receive remittances. Alongside the rise in its diaspora,⁹² the flow of remittances to Ethiopia has increased by a staggering 2,150 per cent from 18m USD in 2001 to 387m USD in 2010, although such an increase may partly reflect the better measurement of remittances. According to the UN Human Development Report of 2009, Ethiopians living in North America, Europe and Middle East contribute 41 per cent, 29 per cent and 24 per cent, respectively, of the total sum of annual remittances to Ethiopia. World Bank figures show that remittances have contributed an average of one per cent to the Ethiopian GDP over the last eight years although the 2006 report suggested that if remittances sent through informal channels were included, total remittances could be as much as 50 per cent higher than the official record. Given the informal nature of much of remittance-sending, the full scale and impact of the regional remittances economy is uncertain.

91 Sheikh, H. and S. Healy (2009). 'Somalia's Missing Million: The Somali Diaspora and its role in Development.' UNDP; IRIN (2011, December 27) 'SOMALIA: US bank move highlights importance of remittances.' Available at: <http://www.irinnews.org/Report/94551/SOMALIA-US-bank-move-highlights-importance-of-remittances>.

92 World Bank (2011) 'Migration and Remittances Fact book 2011', 2nd edition. Washington D.C., World Bank. P. 114. Available at: <http://issuu.com/world.bank.publications/docs/9780821382189?mode=window&pageNumber=16>.

The Eritrean government levies a controversial two per cent tax on all income of its diaspora and reports have indicated that it may make use of forceful tactics to collect remittances at Eritrean embassies and community centres in destination countries.⁹³ Although uncertain, it is possible that in the future governments in the Horn of Africa and Yemen may similarly and increasingly attempt to control and profit from the region's remittance flows.

Available data from the region are insufficient to determine whether remittances are contributing to promoting development in the region beyond the immediate support to households and local communities. Evidence from other regions suggests that remittances are not a panacea for the alleviation of poverty, economic development, job creation and investments; and political and economic reforms coupled with infrastructural improvements may be necessary to create the conditions for sustainable development.⁹⁴ The level of political stability, structural reforms and the economic decisions made by states in the region may determine whether the remittances sent by diaspora communities will continue to operate at a local scale – as they do today – or if they may contribute to national development in the future. More generally, remittance behaviours may change in the future, alongside shifts in the socio-economic conditions in the region as well as in the countries of destination.

Migration and forced migration policies

An important uncertainty for future voluntary and forced migration in the region is the extent to which immigration and asylum policies - i.e. entry channels, border controls, recognition of refugee status, work and residence permits - will affect movement. For example, if *prima facie* refugee recognition ceases for Somalis and host countries such as Ethiopia and Kenya refuse to offer them sanctuary, the impact will be considerable on asylum seekers and existing refugees who may be expected to return to

93 Freedom House (2012) 'Eritrea' Freedom in the World 2012. Available at: <http://www.freedomhouse.org/report/freedom-world/2012/eritrea>

94 de Haas and Vezzoli 2009

Somalia or move onwards to other countries outside the region. Already, some members of government and MPs in Yemen and Kenya have been calling for the termination of their status.

At present, the environment for legal migration and regular working conditions in countries within and neighbouring the Horn of Africa and Yemen is increasingly restrictive, and policies on undocumented migrants seem to be increasingly moving towards detention and deportation. In mid-2012 Kenya started a campaign to 'clear out' (*Fajia Wageni*) unwanted immigrants,⁹⁵ while Somaliland declared an expulsion order against an alleged 80,000 undocumented Ethiopians in late 2011.⁹⁶ Saudi Arabia, the destination of many migrants from the Horn of Africa entering Yemen, has been implementing stricter controls on migrants and deports arrested irregular migrants. At the same time, Ethiopia and Kenya have officially temporarily banned their nationals from working (legally, through recruiting agencies) in selected Gulf States countries because of alleged human rights abuses against their nationals.⁹⁷ Israel, a destination of Eritrean and Sudanese migrants and asylum seekers, carried out deportations in 2012 as part of the country's controversial 'emergency plan' to remove African migrants to 'rescue the homeland', according to Interior Minister Eli Yishai.

The above events may be 'weak signs' that suggest that policies in the Horn of Africa and Yemen or policies affecting migrants from the Horn of Africa may become anti-immigrant and, in some cases, anti-asylum, although it is highly uncertain the extent to which governments will implement such policies. More restrictive immigration policies may increase the vulnerability of migrants and their exposure

to violence, abuse and exploitation on their journeys towards Europe, the Gulf, and North America or redirect their migration to new destinations, rather than reduce migration flows.

On the other hand, economic policies aimed at regional integration – an uncertain yet possible trend that has also been observed – could create opportunities for migrants to move and could encourage the implementation of free movement within the region in the future. It is also possible that destination countries in Europe, North America and Asia may position their migration policies to create new channels of entry for migrants with specific technical and professional qualifications. Although the growth of educational institutions in the region make this a real possibility, this outcome looks less likely in the immediate future.

Conclusion

This section has attempted to provide syntheses of some of the key uncertainties identified through scenario-building exercises with migration experts and stakeholders in the Horn of Africa and Yemen. These syntheses illustrate the various and contrasting ways in which political, economic, social, technological, and environmental factors may develop in the future. Along with the megatrends, uncertainties are explored within scenario narratives to better understand how they may develop and interact with one another, and to analyse their potential consequences for migration. The following section provides brief overviews of the scenario narratives, the scenarios' consequences for migration, as well as the key insights that have arisen through the entire scenario-building process.

95 See <http://www.standardmedia.co.ke/?articleID=2000061492&pageNo=1>

96 See RMMS 2011, (September) 'Mixed Migration monthly summary - Horn of Africa and Yemen.' Available at: <http://www.regionalmms.org/fileadmin/content/rmms%20monthly%20summaries/RMMS%20Mixed%20Migration%20Monthly%20Summary%20-%20September%202011.pdf> and <http://danielberhane.wordpress.com/2011/09/14/somaliland-to-deport-thousands-of-ethiopian-refugees/>.

97 See <http://www.ethiopianreview.com/forum/viewtopic.php?t=39900&p=219681>

Section 6: Tentative future migration scenarios: key questions and insights

The scenarios of this project are generated through an interactive process that includes scenario-building exercises, and data and literature analysis. These scenarios are tentative and should be treated as tools to promote ongoing discussions and to challenge our ideas about international migration in the region. In scenario-building, the process of reviewing the past, identifying and analysing megatrends and uncertainties, and drafting scenario matrices and narratives is as important as the scenario outputs themselves. These *scenarios are in no way predictions of what the future of the region will look like*. Rather, they encourage us to consider the broad range of possibilities and challenge our expectations for the future. The two scenarios presented below were selected by workshop participants *from a wide range of equally plausible scenarios* depicting possible futures for the Horn of Africa and Yemen in the next two decades.

Each of the scenarios has been built on two uncertainties (represented as ‘continuums’) that experts and stakeholders in the Horn of Africa and Yemen considered to be the most important in determining the future of international migration in the region, but also the most difficult to predict in terms of future outlook.

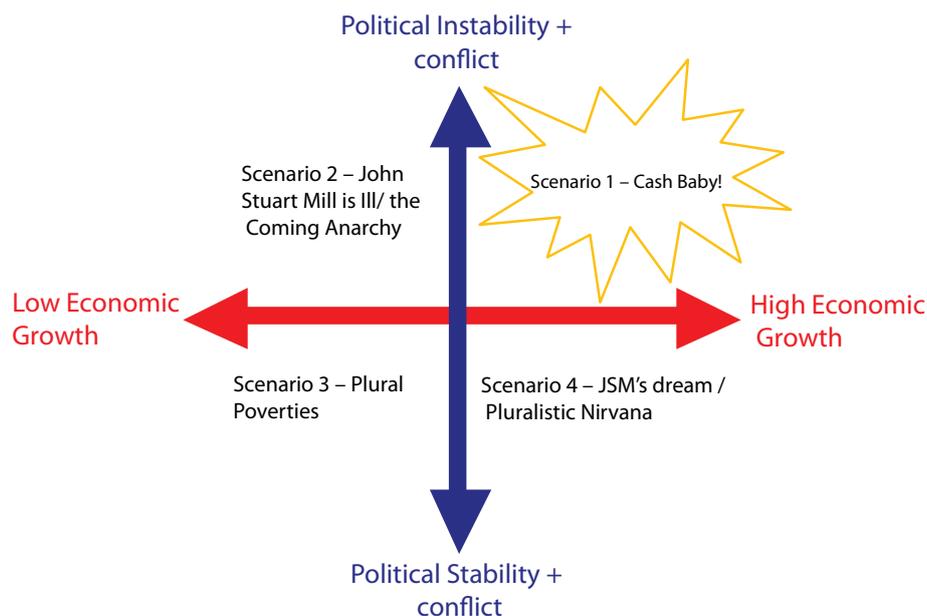
Scenario 1: In the first scenario, the uncertainty continuums are ‘Political instability and conflict’ versus ‘Political stability and relative peace’ on one axis and ‘Low economic growth’ versus ‘High economic growth’ on the other. Participants titled this scenario ‘Cash Baby!’. Its details are developed below.

Scenario 2: In the second scenario, the uncertainty continuums are ‘Peace’ versus ‘Conflict’ and ‘State weakness and fragmentation’ versus ‘State strength and integration’. Participants titled the scenario explored in this matrix ‘Jigsaw puzzle’. Its details are developed below.

Many of the certainties and uncertainties described in the previous sections have

been integrated into the scenarios, which are presented as descriptions of what the political, economic, social, demographic, technological, and environmental landscape may be in 2030. Scenarios, and their building blocks of certainties and uncertainties, should prompt readers to think: *What policies could be developed to meet the challenges and opportunities of different possible futures? How can institutions position themselves* (whether they be private businesses, government bodies, civil society organizations, international organizations, or academic institutions) *to be prepared if and when any elements of these or other scenarios take place? Which institutional capacities need strengthening and which institutional barriers need removing?* Scenarios should open readers’ minds about possible changes in the future as well as the fact that ‘business as usual’ is the *least likely scenario*.

(see scenario 1 and 2 page 38).



Scenario 1: *Cash baby!*

'Cash Baby!' is a scenario characterised by high levels of violence and political instability and high, but erratic and unequal economic growth. There is a large presence of foreign investors, a rapidly developing private sector, significant infrastructural improvements in central areas, and large-scale environmental degradation caused by a boom in the region's extractive industries. Society is deeply divided according to class and ethnicity and such divisions are exacerbated by unequal participation in growing industries. The region is experiencing increases in refugee and IDP flows, higher-skilled circular mobility, and intra-regional lower-skilled and rural-to-urban migration.

Political: In 2030, political instability and widespread violence characterise the Horn of Africa and Yemen. The presence of rebel groups and armed factions has increased in various countries. In particular, civil war continues in Somalia and tensions persist between Sudan and South Sudan. There is some security in areas surrounding mineral, gas, and oil extraction businesses, for wealthy foreign and domestic business owners have cut deals with governments to provide security or engage private security companies. People in the region are witnessing an overall further decline in their individual and communal rights to free expression, organisation, and movement.

Economic: The mining, oil, and natural gas sectors are experiencing high, but erratic, levels of growth. Although this provides significant employment, most benefits of this growth accrue to a wealthy few. These industries have furthered infrastructural development in the region. In joint ventures with local businesses and politicians, Chinese, Korean, Indian and other foreign businesses are investing in building roads and improving power grids. While GDP figures are increasing, so is income inequality. There is an increased centralisation of wealth in urban centres and large sums are being transferred abroad. Such capital flight is facilitated by the expansion of banking systems.

Social: Ethnicity and class affiliations greatly determine economic inequality in the region, contributing to tensions and violence. Pastoral groups have been under particular socio-economic strain and have led a series of large-scale public protests against the appropriation of land for resource extraction and water mismanagement which threatens their way of life. The position of women in society has not improved, and has in fact declined relative to the rest of the world. This is partially the consequence of the decline in public healthcare and education. Privatised education and social services are available to economic and political elites in urban areas, whereas the majority of the population in both rural and urban areas relies

upon educational centres sponsored by religious groups and community-organized healthcare providers. These services do not compensate for the lack of state-sponsored healthcare and education, and they often rely on limited funding from migrant communities abroad and NGOs.

Demographic: Widespread violence and the decline of healthcare and education systems have caused a decline in life expectancy and a rise in infant and child mortality. While fertility is still high by international standards, it is decreasing, and this is contributing to an overall decline in population growth from 2.6 per cent in 2010 to 1.8 per cent in 2030. Urban areas are growing across the region as cities continue to offer better economic opportunities and social services, such as work, education and healthcare, relative to rural areas.

Technological: The region is experiencing a boom in technology transfer and imports, largely information and communication, navigation, and surveillance technologies. Businesses from Europe, China, and elsewhere are investing in cash cropping in the region and are introducing water-saving irrigation techniques and genetically altered crops that require less water and are more disease-resistant. Traditional remittance technologies have not experienced the growth that was anticipated as mobile banking technologies (i.e. direct bank-to-bank transfers via mobile connection) have advanced and skyrocketed throughout the region, encroaching on the space that remittance companies once dominated. People in the region are using these technologies not only to receive funds from kin abroad, but also to transfer funds within the region to kin and businesses in rural and urban areas.

Environmental: The extraction of underground water for industry and agriculture has lowered water tables and the pollution of water sources by industrial projects have contributed to increased water scarcity in some rural areas. Potable water availability in urban areas has also been affected by industrial usage as well as urban consumption; however, water management systems and technologies have advanced and become more efficient in mitigating the risks of water scarcity.

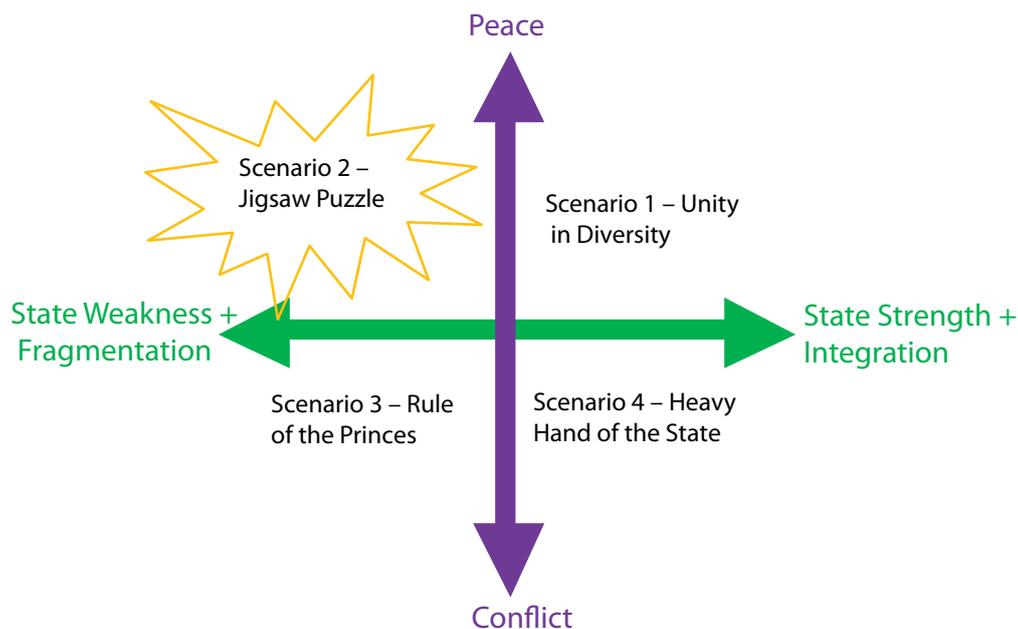
Consequences for migration: *Cash Baby!*

In 2030, political instability and conflict continue to generate flows of internally displaced people and refugees within the region. Subsistence farmers and pastoralists are particularly affected, as they no longer have access to the land that previously supported their livelihoods, which has been expropriated by industry and commercial farms. Refugee movements and the demand for resettlement to countries outside of the region have also risen as a consequence of mounting socio-ethnic tensions and persecution in countries with larger populations, such as Ethiopia, Sudan, and Kenya.

Over the last 20 years, rural-to-urban migration has been high, but has particularly accelerated in Uganda, Ethiopia, Eritrea, and Kenya. The development of infrastructure and rise of mining, oil, and gas industries have displaced some rural communities to nearby areas and prompted others to move to cities. The decline of public education and healthcare institutions across the region, especially in rural areas, has also raised people's aspirations to move to cities and to more prosperous countries.

Because of better infrastructure and some increase in income, people increasingly migrate as students and unskilled and skilled workers to the Gulf, Europe, North America, while China and India have also risen as new destinations. For poorer people and families, growing inequality and the decline of state-provided welfare has precluded their migration abroad.

Highly skilled international migration has increased and become more circular, as the number of (foreign and domestic) businessmen working in multinational firms in the region's growing industries has increased. International contract security agents are also increasingly recruited to protect the industry sites and firms, as well as the homes of wealthy businessmen and investors. Thriving extractive industries and infrastructural improvements have also prompted considerable internal and intra-regional migration.



Scenario 2: Jigsaw Puzzle

Jigsaw Puzzle is a scenario characterised by peace and political stability, arising from decentralised governing structures that give greater autonomy to different socio-cultural groups. Overall, there is greater tolerance towards ethnic and cultural diversity and a re-discovering and re-appreciation of certain traditions. Economic growth is relatively slow, but economic diversification has made this growth less volatile. Population growth continues and urban infrastructures are strained. There has been a rise in asylum in-migration, labour immigration, rural-to-urban migration, independent female migration, and labour migration to new destinations abroad.

Political: In 2030, people of the region enjoy widespread peace and political stability. The emergence of decentralised governing structures in the mid-2020s has resulted in a reduction in autocratic rule and internal political conflict. Following Uganda's example of decentralisation starting in the late 1980s of giving greater governing power to district and local administrations, countries across the region have implemented political reforms to give greater autonomy to ethnic communities. Greater regional autonomy has also decreased ethnic tensions. The international community

has been appealing to the Horn of Africa at the regional and state level to allow external investments in border security and control to prevent piracy and the illegal transfer of goods and commodities. Presently, the US, EU, and other foreign governments are shifting to engage local administrations to ensure their perceived security and economic interests.

Economic: Countries in the Horn of Africa and Yemen are characterised by relatively slow but steady economic growth. Income inequality has declined and economies have become more diversified and stable. Domestic private companies have purchased some state-owned assets and there is an increasing presence of large multinationals from China, Brazil, India, Turkey, and the Gulf. Some domestic and multinational businesses focus on the region's mineral, natural gas, and oil wealth, while others on the region's growing entertainment (music and film), service, and cultural goods sectors. Governments in the Horn of Africa are providing incentives to unregistered businesses – e.g. in the form of free shop spaces, business insurance, and low interest short-term loans – in an attempt to promote tax payments and entrance into formal domestic economies. These incentives have stimulated the establishment of businesses by women, particularly in rural areas, by providing alternatives to agricultural-based livelihood strategies.

Social: There has been growing tolerance towards ethnic and cultural diversity in the region since social tensions peaked in the early 2020s. The primary sources of tension were the exacerbation of social and economic marginalisation in Kenya's Turkana region, with the struggle over the management of oil reserves discovered in the previous decade; violence on the Sudan-South Sudan border linked to oil and ethnic conflict; and tensions between Kenya, Somalia, and Ethiopia over territories occupied by ethnic Somalis and increasing security concerns over large Somali refugee populations in both countries. In some regions, there has been a rediscovery and re-appreciation of cultural traditions.

Demographic: The Horn of Africa and Yemen is experiencing a population growth rate of 2.4 per cent with fertility rates above replacement levels and mortality in decline because of improved access to and quality of health services. The 15 – 24 age cohort has remained relatively steady at approximately 20 per cent of the population. Literacy rates are also increasing and the achievement gap between boys and girls is declining.

Technological: Decades of private and government investments and technology transfer have improved the quality and reach of the public education, research, and health sectors. Governments in partnership with foreign universities have invested in research and development programmes at a few of the region's leading academic institutions to create hubs for research and innovation over the next 10 years. Technologies have advanced in hospitals to improve medical testing and treatment and to promote awareness about personal and communal health; however, a lack of government support has prevented a domestic pharmaceutical industry from emerging to produce high quality and affordable drugs to address some of the region's pressing health concerns, e.g. malaria, cholera, tuberculosis, HIV/AIDS.

Environmental: Pollution and industrial waste disposal and overall city planning are big concerns as cities, such as Nairobi and Juba, have grown dramatically over the last 20 years.

Few policies have been put in place to regulate industrial and automotive emissions and air quality has diminished considerably. Rainfall variation and fresh water stress are also issues of concern, particularly in urban areas, as water use efficiency has not kept pace with increasing water needs for industry and agriculture.

Consequences for migration: *Jigsaw Puzzle*

In 2030, peace and political stability has reduced internal displacement and refugee flows within and from the region, and has prompted the large-scale return of refugees. The region is now becoming an asylum destination for people from the Middle East, North Africa, and the Great Lakes. Nevertheless, large numbers of refugees from the Horn of Africa and Yemen who settled in Europe and North America are remaining abroad as their children are rooted in their new societies and these countries still offer better economic opportunities. The level of circulation between the region and Europe and North America is high as many emigrants have dual citizenship and invest in the region.

Increasing education and improved transport and telecommunication technology is inspiring a new generation to achieve higher living standards, and has also given them the opportunities to migrate. This has caused increasing low- and medium-skilled labour migration from the region and Ethiopia in particular to Europe, the Gulf, Turkey, North Africa and China. This has been facilitated by the transformation of these new destinations from net emigration to net immigration countries. The increase in multinational businesses and international partnerships with China, India, Russia, and Turkey and the growth in the number of private companies in the region have increased temporary immigration of high-skilled workers from these countries, as well as increased migration of workers and students to these countries. Labour migration from other parts of the continent, particularly from the Great Lakes region, to the region has increased alongside the growth of industries, with higher and lower skilled workers being attracted by employment opportunities in the entertainment, service, and health sectors.

Greater employment and educational opportunities for women have increased the number of women who independently migrate within and from the region. Many women migrate to cities to work in domestic, care, nursing, and social work; and many increasingly migrate abroad, particularly to Europe, North America, the Gulf, and China, where they can earn higher wages and enjoy more favourable work conditions, including flexible migration schemes and portable pensions. In fact, Ethiopia has emulated the Philippines' example by massively investing in nursing education in a strategy to export skilled female labour abroad.

Rural-to-urban migration has continued because of persisting labour demand in growing cities and the better social and educational opportunities cities offer. Affluent suburbs have appeared and grown as the wealthy have moved away from overcrowded city centres.

Insights for future research, practice, and policymaking

This section presents insights and key questions for future research, practice and policymaking that arose through the process of scenario-building and through roundtable discussions with experts and stakeholders during the project's workshop in Nairobi in April 2012. The scenario methodology is particularly suited to assist migration stakeholders who want to engage in planning for the future, for it prompts them to tap into their own expert knowledge and experiences, to engage in fruitful and creative exchanges with other stakeholders with different interests and expertise, to break away from the constraints associated with thinking in the present, and to identify and examine the key issue-areas for the future.

Future migration patterns

- As the most stable and developed country in the region, Kenya's role as a migration hub seems to be increasing.
- At present, *migration from and to the Horn of Africa and Yemen is relatively low* compared to most other world regions. Therefore, the region has *significant*

migration potential, particularly for populous countries like Ethiopia.

- Past and future increases in education and income, further improvements in communication and transport infrastructure, and the rapid development of cities, make it *likely that intra-regional migration will increase*.
- While migration to wealthy countries in Europe and North America is still relatively small, human and economic development is also likely to increase migration to *new and distant destinations*.

Re-conceiving and operationalising 'mixed migration'

- In the future, it may continue to be difficult to distinguish refugees from other migrants and determine who deserves protection in the Horn of Africa and Yemen, given the complex interrelationships of the political, economic, and social factors driving migration.
- Actors concerned with migrant and refugee protection face the challenge of adapting to recognise the multiple and complex combination of factors that affect migration *and* forced migration decisions.
- The complex and mixed nature of migration determinants in the Horn of Africa and Yemen reveals that the future protection needs and future 'durable' solutions for forced migrants (and migrants) may be increasingly diverse and require more livelihoods- and development-focused interventions.
- **Mobility must be reconceived as a potentially positive adaptation strategy or coping mechanism rather than solely or mainly a response to crises.**

Re-conceiving environmental change and migration

- When the environment does play a more direct role in driving migration through rapid onset disasters and extreme events, movement tends to be internal

- and temporary. Hence, displacement linked to disasters is likely to be an issue most appropriately and successfully addressed through **targeted domestic policies**, which aim to reduce the vulnerability of people to such events.
- Based on existing research, the most significant **climate change impacts are likely to take effect in the longer term**. Instead, **environmental variability (e.g., cycles of dry and wet years) is of greater concern to policy** when exploring the future of the region within a 2030 time horizon.
 - Policies aiming to address 'environmental drivers' of migration are **likely to be ineffective**, given the indirect impact of environmental factors on migration. Instead, policies centred on improving people's access to education, health care and employment as well as improving the protection of people's rights will increase their resilience to cope with environmental stress, whether this means that people will migrate or not.
 - **Migration may be a positive adaptation strategy** to environmental variability and change.
 - Environmental degradation linked to **unregulated urban growth and industrial development**, for instance in the oil extraction industry, may be areas of environmental concern that governments may position themselves to address.

Accommodation of various non-state actors

- Governments and international organizations should increase their capacities for working with a **wider range of actors in the migration field**, particularly migrant employers and the private sector, the media – which shape public attitudes towards migration and migrants, academic institutions (to engage migrant students), and local authorities.
- In light of the multiple forces compelling people to migrate in the region and the likely rise in migration in and from countries like Ethiopia and Kenya, there

seems to be a need for governments to develop more coherent and effective national **immigration policies**.

- Governments and international organizations should prepare for the **impact that future economic development (e.g. oil and natural gas extraction) and technological change** might have on immigration in the region.
- In the case of continued economic development and private sector growth, governments are compelled to plan for ensuring the protection of the rights of local workers and migrant workers participating in domestic, regional, and international labour markets.

Future cities

- Rapid urbanisation trends highlight the **necessity of urban planning** in the region. There is a high potential for increased rural to urban migration across the region. City and local governments, for instance of Nairobi and Addis Ababa and perhaps also Mogadishu, should therefore plan for significant urban population growth caused by a combination of natural increase and rural-urban migration as well as immigration.

Identity

- In light of potential increases in future migration in the region, governments and international organizations may consider **developing integration programs for migrants and national populations**. Rising xenophobia is an issue of concern for the future, in which governments can play a mitigating role.

Conclusion

Migration is a complex and 'mixed' phenomenon in the Horn of Africa and Yemen, as both voluntary and forced migration are shaped by a wide range of political, economic, socio-cultural, technological and environmental factors. Humanitarian and development crises and protracted situations of displacement further increase the complexity of regional migration patterns.

The development of exploratory scenarios of potential mixed migration futures is an ambitious, but valuable exercise for policy-makers, donors, and humanitarian and development workers who seek to engage in longer-term planning and to improve protection of the rights of migrants and refugees. The Horn of Africa and Yemen constitute a region that is both economically dynamic and politically volatile. Perhaps more so than elsewhere in the world, analyses of migration futures need to take into account (rather than to avoid) the uncertainties surrounding the key economic and political factors driving migration in, from and to the region. Both IMI and RMMS hope that this report provides valuable input for more targeted studies and contributes to planning for the future. Furthermore, while this project does not provide predictions of the future of the Horn of Africa and Yemen, it has shown *some* of the futures that are *possible*.

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