ACTION COMMITTEE FOR THE

Mediterranean

The Mediterranean: The Border that Re-unites

ELEMENTS OF DEMOGRAPHIC FORESIGHT

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Executive summary

Europe is experiencing a demographic decline, while the population on the southern shore of the Mediterranean continues to grow. In this context, trans-Mediterranean mobility could offer viable responses to labor shortages in the North, while simultaneously delivering economic benefits to the South. Yet, paradoxically, many governments in Northern Mediterranean countries denounce immigration with renewed vehemence, while their Southern counterparts decry the persistent outflow of their most talented citizens toward the North. It is this contradiction that the present report seeks to address—by quantifying trans-Mediterranean mobility flows and projecting future demographic trends.

Europe has entered an era of depopulation. Since the early 2000s, a persistent decline in fertility rates, accelerated population ageing, and a shrinking labor force have taken root and shown no sign of reversal. Contrary to the claims of neo-Malthusian thinkers, these dynamics entail far-reaching consequences for the economies of the Northern Mediterranean. The sustainability of pension systems is increasingly undermined by demographic ageing and a declining working-age population, while labor shortages are becoming more acute across the labor market—affecting both low-skilled sectors and highly skilled professions such as medicine and information technology. Depopulation will age Europe before it reduces its overall numbers: it is the youth, and then the working-age cohorts, who are first diminished by declining birth rates. As an illustration, in 2024 the European Union counted slightly fewer than three individuals of working age for every person over sixty-five—compared to nearly four for one in 2013.

How, then, can we avoid the trap of declining birth rates? Four—non-exclusive—responses may be considered: pro-natalist policies, an increase in labor force participation (particularly among youth, women, and seniors), automation, and, finally, immigration. Scholarly consensus affirms that while pro-natalist policies may help slow the decline in fertility, they rarely succeed in reversing it. Increasing the labor force participation rate can mitigate the contraction of the working-age population; yet, even with robust measures, projections estimate a further 7.5% decline in the active population of the European Union by 2050.[1] Automation, employed most notably by Japan, which has long resisted immigration, may offer a partial remedy for labor shortages in the industrial sector. However, it proves less adaptable to service-based economies—such as those predominant in Europe—and cannot, in any case, be regarded as a comprehensive solution.

Immigration thus remains. While it currently poses significant integration challenges in the North, it also constitutes the most effective means of counteracting the effects of depopulation. Absent immigration, the European population would collapse: from 449.3 million inhabitants in 2025 to 408.5 million in 2050—a decline of 9.1% over 25 years. For comparison, the First World War resulted in the death of approximately 3.8% of the French population. The decrease in the working-age population would be even more pronounced: should the number of foreign workers cease to grow, the population aged 15 to 64 in Europe would shrink by over 20% by 2050. Even if current levels of immigration are maintained, this cohort would still decline by 10.5% over the same period. Labor shortages—already evident in certain sectors—would become widespread in the absence of corrective measures.

Some countries are already acutely aware of these demographic vulnerabilities. In Italy, under the leadership of Giorgia Meloni, the working population is expected to decrease by 9.3% by 2050 if immigration continues at its current pace; in the event of a total halt in migration flows, that decline would reach 31%.[2] This illustrates the extent to which migration underpins the country's economic future. It also helps explain why, despite an officially anti-immigration stance, the Italian government chose to regularize 452,000 individuals between 2023 and 2025 under the Decreto Flussi. More broadly, the Northern Mediterranean states—led by Italy and Germany—have adopted a dual-track policy: on the one hand, expanding pathways for labor migration; on the other, intensifying efforts to curb all other forms of migration.

1 European Commission, *Ageing Report Economic & Budgetary Projections for the EU Member States 2022-2070*, 2024.
2 Eurostat, *Population on 1 January by age, sex and type of projection*, 2023.

The countries of the southern shore of the Mediterranean are experiencing demographic trajectories that are the mirror image of those observed to the North. According to median projections, Egypt's population is expected to increase by an impressive 36%, rising from 118.4 million in 2025 to 161.6 million by 2050. Algeria will follow a similar trend, with a 31% increase, reaching 59.6 million inhabitants in 2050, up from 45.4 million in 2025. Both Egypt and Algeria also stand out for their exceptionally youthful populations: in Egypt, for instance, there were 12 individuals of working age for every person over the age of 65 in 2025.

Beyond its youthfulness, the population of the Southern Mediterranean is also becoming increasingly educated. The number of students is rising even faster than the overall population—particularly in academic fields that align with sectors experiencing labor shortages, such as engineering and medicine. Yet, graduate unemployment remains alarmingly high in many Maghreb countries. In 2024, it exceeded that of the general population in both Morocco (19.7% among graduates compared to a national average of 13%)[3] and Egypt (33.6% among recent graduates compared to an overall rate of 6.7%)[4]. The difficulty of integrating young graduates into the labor market often drives them to emigrate, fueling acute brain drain dynamics in the South. From a Southern Mediterranean perspective, migration to Europe is thus perceived alternately as a depletion of top talent or as a socio-economic safety valve that helps ease labor market tensions.

Today, although European public opinion remains largely opposed to immigration—over 70% of respondents in France, Germany, and Italy, and 61% in Spain[5] express unfavorable views—there is a notable openness toward labor migration, with 58% of French[6] citizens expressing support. The declining number of active workers has become a matter of concern, even among those generally skeptical of immigration. In this context, demography may offer a pathway toward structural integration at the Mediterranean scale, where political mechanisms alone often struggle to generate consensus.

The Mediterranean thus embodies a paradox: it is both a geographical boundary and a strategic junction. Southern societies—Morocco, Tunisia, Algeria, as well as Egypt and Lebanon—possess demographic reserves of youth,

3 Haut-commissariat au plan du Maroc, *Note d'information du Haut-commissariat au plan relative à la situation du marché du travail en 2023.*.
4 Chiffres de l'Agence pour la mobilisation publique et pour les statistiques, novembre 2024. Voir aussi « 6,7% de la population active égyptienne touchés par le chômage au troisième trimestre 2024 », *Ahram Info*, 14 novembre 2024.
5 Confrontations Europe et ViaVoice, *Europe, continent d'immigration et de mobilités*, september 2023
6 Sandra Hobian & Lucie Brice Mansencal, *Enquête sur les représentations à l'égard de l'immigration de travail*, Terra Nova, 12/05/2025.

a growing educational capacity, and deep cultural ties with Europe. This report highlights a phenomenon that remains largely underestimated: the rising skill level of migration flows. Mediterranean migration is no longer primarily rural, low-skilled, or informal; it is increasingly characterized by individuals with intermediate to high qualifications, particularly in sectors such as healthcare, engineering, and education. This evolution invites a fundamental rethinking of migration policies—not as instruments of restriction and control, but as tools for co-development and economic competitiveness.

Yet integration through demography cannot simply be declared—it must be constructed. It requires a policy framework grounded in *anticipation*, cooperation, and trust. Anticipation, because the effects of demographic transition are already in motion, and early action is needed to adapt educational, social, and economic systems accordingly. *Cooperation*, because no country can address alone the interwoven challenges of ageing, migration flows, and geopolitical stability. And *trust*, finally, because collective perceptions of migration will continue to generate tension as long as political narratives remain driven by fear rather than by shared vision.

Introduction: Population Dynamics and Regional Integration in the Mediterranean

Europe has entered the era of depopulation. The very continent that once proclaimed, with Jean Bodin, that "there is no wealth but man", and whose population more than doubled in the 19th century, is now deeply concerned by its demographic decline. Since the turn of the millennium, Europe's fertility rate has fallen steadily, reaching a historic low of 1.38 children per woman in 2023[7]. Spain and Italy fare even worse, with respective fertility rates of 1.12 and 1.21 in the same year[8]. Whereas Europeans in the 1980s were preoccupied with whether there would be enough jobs for a growing population, they now fear the opposite: that there may no longer be enough people to fill the roles necessary for the proper functioning of the economy. Critical sectors such as healthcare, home care, construction, hospitality, retail, and software development—among others—are facing severe labor shortages.

While low birth rates were once praised and even sought after by Malthusians until the end of the 20th century, they now carry dramatic consequences for European societies. Like environmental degradation, depopulation is a long-term affliction; and like the environmental crisis, it requires sustained, forward-looking action to avoid collective decline. The first signs of demographic contraction are already visible: in 2024, the median age in the European Union had risen to 44.7 years, compared to 39.3 in 2004 and 35.2 in 1990[9]. We cannot afford to wait for conditions to deteriorate further before we act.

7 Eurostat, *Total Fertility Rate*, June 2025.

8 *Ibid*.

9 Eurostat, *Population Structure Indicators at National Level*, May 2025

The consequences of demographic decline are not only severe—they are also predictable. As demographer Paul Morland puts it, “demography is like a film playing in different cinemas: even if it is not finished in all of them, we already know how it ends”[10]. Europe’s future may well echo the path of Japan. The demographic aging of Japan and several Northeast Asian countries such as South Korea and Taiwan has preceded that of Europe: Japan, which has not reached the population replacement rate since 1974, has undergone three decades of economic stagnation linked to depopulation. Its economy is expected to face a shortfall of 11 million workers by 2040. The cycle begins with population aging, followed by a decrease in the number of young people, then of students, and eventually of working-age adults and contributors to pension systems. Moreover, the cost of elderly care increases in societies marked by prolonged low fertility, while being shouldered by a shrinking active population. In some countries, the stakes are so high that declining birth rates are now considered a matter of national security[11].

Fortunately, if the effects of low fertility are well understood, so too are the available remedies—namely, four: pronatalist policies, the automation of the economy, increasing labor force participation, and immigration. While pronatalist policies are crucial—and fertility tends to hold up better in countries that adopt them—research is unanimous that they are insufficient to reverse the low-fertility spiral gripping European societies. Automation may offer solutions in certain industries but falls short in many service-based sectors, which are themselves struggling with labor shortages. Additionally, widespread automation introduces a disquieting social model: it is difficult to imagine replacing human caregivers in nurseries or retirement homes with robots. Increasing the labor force participation rate, particularly among women, youth, and older adults, is being implemented across Europe. Yet even the most ambitious efforts in this area will likely be inadequate. According to European Commission projections, the EU could lose 15.63 million working-age adults (aged 20–64) by 2050, and as many as 24.88 million by 2070—even with proactive measures[12].

This leaves immigration. While migration alone cannot restore population replacement levels, countries experiencing demographic decline are already compensating for shrinking workforces by relying on it. Paradoxically, however, the greater the need for immigration, the more its presence is contested. Giorgia Meloni, elected on an anti-immigration platform, nevertheless authorised

10 Paul Morland, *The Human Tide: How Population Shaped the Modern World, New York: PublicAffairs,* 2019, p. 267.

11 This is notably one of the key arguments developed by Nicholas Eberstadt, “The Age of Depopulation: Surviving a World Gone Gray,” *Foreign Affairs*, November–December 2024. See also: Nicholas Eberstadt, “Population Change and National Security,” *Foreign Affairs*, Summer 1991.

12 This projection assumes an increase in labor market participation from 79.4% in 2022 to 82.7% in 2070, driven by successive pension reforms and a rise in female labor force participation (source: European Commission, *The 2024 Ageing Report: Economic and Budgetary Projections for the EU Member States (2022–2070)*, pp. 4 and 343).

450,000 work permits for foreign workers in December 2023. Similarly, in Germany—which requires 400,000 immigrant workers per year to meet its labor needs[13]—the AfD party continues to vilify immigration with growing success. The proliferation of anti-immigration rhetoric highlights a broader crisis in migrant integration across the northern Mediterranean, precisely at a time when countries should be competing to attract talent.

Indeed, rather than dividing the region, migration should be fostering greater convergence between the northern and southern shores of the Mediterranean. The North is progressively closing its borders to southern migration, while the South decries the brain drain orchestrated by the North—Tunisia, for instance, lost 39,000 of its 90,000 registered engineers between 2015 and 2020 alone[14].

And yet, the profound complementarities between Mediterranean countries make a strong case for closer regional cooperation. The southern Mediterranean—particularly Egypt and Algeria—faces a demographic reality that is the mirror opposite of Europe’s: the demographic transition remains incomplete. According to UN projections, Egypt’s population is expected to grow from 112 million to 160 million by 2050. National labor markets are unable to absorb the vast numbers of young people entering the workforce each year, and youth unemployment—especially among graduates—is alarmingly high. In the South, high birth rates are a challenge; in the North, they would be a solution.

In many respects, the Mediterranean already functions as an integrated region. Many graduates from the southern shore migrate to the North in search of better job prospects, exacerbating a brain drain that undermines Maghreb economies. At the same time, numerous northern companies—seeking skilled labor at lower costs—have invested in cross-Mediterranean value chains. However, these patterns of mobility and cooperation remain fragmented and lack a coherent strategic framework. The challenges facing both shores demand a new approach—one based on the conclusion of comprehensive regional agreements. These agreements should simultaneously address labor migration, vocational training, investment in shared value chains, infrastructure development, and integration policies in destination countries.

Why? Because the region is bound to undergo accelerated integration, driven by demographic dynamics.

This paper contributes to the analysis undertaken by the Comité d’Action pour la Méditerranée during the meeting held in Málaga (Spain), on 23–24 June 2025.

13 “Warum braucht Deutschland 400.000 Migrantinnen und Migranten pro Jahr?” (*Why Does Germany Need 400,000 Migrants per Year?*), Institute for Employment Research (IAB), 2024. See also Jeanette Süß, “Between Inertia and Openness: Germany Reforms Its Labor Immigration System,” *Notes du Cerfa,* No. 174, French Institute of International Relations (Ifri), July 2023.

14 Institut Tunisien des Études Stratégiques, *La fuite des cerveaux parmi les ingénieurs en Tunisie : causes, conséquences et propositions de politiques économiques*, juin 2024, p 22.

Part I.
Demographic Trends in the Mediterranean: Towards Complementarity Between the Two Shores

I. European Societies: From Demographic Winter to a Natality Ice Age

A. EUROPE'S DEMOGRAPHIC DECLINE AND ITS UNDERLYING CAUSES

European societies are currently facing an alarming demographic downturn. Since the 1990s, the fertility rate within the European Union has exhibited a persistent downward trend, remaining below 1.6 children per woman since 1992. By 2023, it had further declined to 1.38 children per woman[15]. This figure lies significantly below the generational replacement threshold, estimated at approximately 2.05 children per woman.

This demographic concern has received limited attention in France, historically perceived as an exception within Europe. Since 2006, France maintained a fertility rate close to two children per woman [16] until a marked drop to 1.67 in 2023, followed by a further decline to 1.62 in 2024[17]. France no longer holds the highest fertility rate in the European Union—this distinction now belongs to Bulgaria, with 1.81 children per woman in 2023[18]—but it nonetheless remains among the most fertile member states. This context underscores the gravity of the overall situation.

In the early 2000s, some commentators referred to the phenomenon as a "demographic winter"[19], suggesting the possibility of a rebirth. Such optimism is now increasingly difficult to sustain, as most European societies appear to be caught in what demographers describe as the "low fertility trap"[20]. This dynamic is characterized by three interrelated mechanisms: first, a sustained decline in births leads to a reduced number of women of reproductive age in the subsequent generation, meaning that even a recovery in fertility rates would not prevent a further decline in births. Second, the normalization of low fertility fosters a societal model that discourages younger generations from reversing the trend. Third, from an economic standpoint, prolonged fertility decline increases the financial burden on working-age individuals who must support a growing elderly population, thereby limiting their ability to invest in child-rearing and education. Thus, the low fertility trap raises serious doubts about the prospect of a future demographic "spring," suggesting instead the onset of a prolonged natality "ice age."

The causes of declining fertility are manifold. Some are structural in nature. The rural exodus, now completed across most developed countries, has transformed children from being a source of labor in agrarian economies into an economic cost in urban settings—where parents must now consider educational and university expenses[21]. Demographic research has also established a clear correlation between women's educational attainment and declining birth rates. The expansion of educational opportunities across Europe has resulted in a widespread postponement of childbirth until after the completion of higher education.

Other factors are more cyclical or contextual, such as housing costs or the availability of appropriate childcare services. Rising housing prices tend to suppress fertility overall: while homeownership may encourage larger families, high rental costs deter childbearing[22]. Between 2010 and 2023[23], housing prices per square meter increased by 48% across the European Union[24].

15 Assemblée Nationale, *Rapport sur les changements démographiques et la nouvelle solidarité entre les générations*, n°2887, 22/02/2006 pour la période 1990 – 2005 ; et Eurostat, *Indicateur conjoncturel de fécondité*, June 2025.

16 World Bank, *Fertility Rate, Total (Births per Woman) – France.*

17 INSEE, *Demographic Report 2024*, 14 January 2025.

18 Eurostat, *Fertility Statistics*, 2025.

19 Gérard-François Dumont, "The Geopolitical Consequences of Europe's 'Demographic Winter'," *Géostratégiques*, 2008, pp. 29–46.

20 Wolfgang Lutz, Vegard Skirbekk, Maria Rita Testa, "The Low Fertility Trap Hypothesis: Forces That May Lead to Further Postponement and Fewer Births in Europe," *International Institute for Applied Systems Analysis*, April 2006.

21 See Gary S. Becker and H. Gregg Lewis, "On the Interaction between the Quantity and Quality of Children," *Journal of Political Economy*, Vol. 81, No. 2, 1973.

22 S. Adhikari, W. Lutz, & E. Kebede, "Forecasting Africa's Fertility Decline by Female Education Groups," *Max Planck Institute*, 2024.

23 See for example Jeff Tucker, "Birth Rates Dropped Most in Countries Where Home Values Grew Most," *Zillow Research*, June 6, 2018.

24 Doloresz Katanich, "Housing Market: Where Is Buying Most Expensive in Europe?", *Euronews*, 2 December 2024.

This sharp increase in costs has made it considerably more difficult for young working adults to establish a household. In France, for instance, a median-income worker under the age of 30 has, on average, lost the equivalent of twenty square meters of housing purchasing power in major urban areas since 2004—corresponding to the loss of one or two children's bedrooms[25].

The availability of accessible and reliable childcare services also plays a crucial role. Studies show that a 10% increase in childcare coverage may raise the fertility rate by 0.1 points in Norway, and by 0.3 points in Germany[26]. In 2013, Germany introduced a legal entitlement to childcare for children over the age of one, a measure that coincided with a modest increase in fertility—from 1.42 to 1.58 children per woman between 2013 and 2021[27]. However, this trend reversed after 2022, with the fertility rate falling again to 1.39 in 2023[28]. While the development of childcare infrastructure does have a measurable impact on fertility, it is unlikely to produce a decisive and sustained recovery in birth rates.

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B.
THE DECLINE IN BIRTH RATES AND PROLONGED NEGATIVE NATURAL BALANCES

1.
The Decline in Birth Rates Is More Pronounced in Spain and Italy

The erosion of fertility rates does not occur at the same pace across all territories of the Old Continent: France, which until recently maintained one of the highest fertility rates in the EU, saw this rate decline from 1.99 to 1.62 between 2013 and 2024[29]. Other countries, such as the United Kingdom, follow a similar trajectory, with an estimated rate of 1.6 in 2022[30]. Some Member States exhibit even more worrying levels: Spain recorded a fertility rate of only 1.16 in 2022 (dropping further to 1.12 in 2023), just ahead of Malta (1.08), placing them among the lowest in Europe[31]. Italy, meanwhile, registered a fertility rate of 1.21 children per woman in 2023[32]; its fertility rate has not exceeded 1.46 children per woman in the 21st century, placing the country in a situation of prolonged low birth rates.

25 Maxime Sbaihi, *Les balançoires vides. Le piège de la dénatalité*, Éditions de l'Observatoire, 2025, p. 194.

26 Hippolyte d'Albis, Paula E. Gobbi, Angela Greulich, "Having a Second Child and Access to Childcare," *Journal of Demographic Economics*, May 2017; Stefan Bauernschuster, Timo Hener, Helmut Rainer, "Does Expanding Public Childcare Encourage Fertility? County-Level Evidence from Germany," *Ifo Working Paper*, No. 158, April 2013, both cited in Maxime Sbaihi, *Ibid.*., p. 183.

27 Eurostat, *Total Fertility Rate*, June 2025.

28 *Ibid.*

29 Eurostiat, *Total Fertility Rate,* June 2025; INSEE, *Demographic Overview 2024*, January 14, 2025.

30 World Bank, *Fertility Rate, Total (Births per Woman)* – United Kingdom, 2022.

Figure 1 - Evolution of the fertility rate

Reading: In 2023, the fertility rate in Italy was 1.21 children per woman.

Graphique: Action Committee for the Mediterranean

Source : Eurostat

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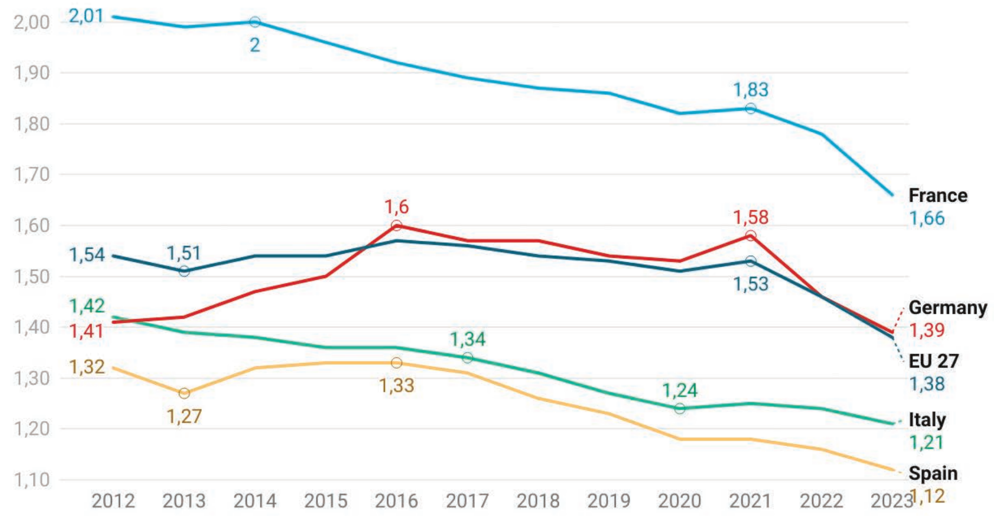


2.
Low or Even Negative Natural Population Balances

The natural population balance, defined as the difference between the number of births and the number of deaths over a given period, has sharply declined within the European Union due to sustained low birth rates. This demographic decline is no longer offset by increases in life expectancy, which has nonetheless risen from 80.2 years in 2012 to 81.4 years in 2023 across the European Union[33].

Between 2015 and 2023, the cumulative natural population balance of the Member States deteriorated significantly, shifting from an annual deficit of 290,899 individuals in 2015 to a deficit of 1,173,710 in 2023. Over the course of eight years, this represents a decrease of nearly 800,000 persons, reflecting a widening gap between the number of births and deaths[34].

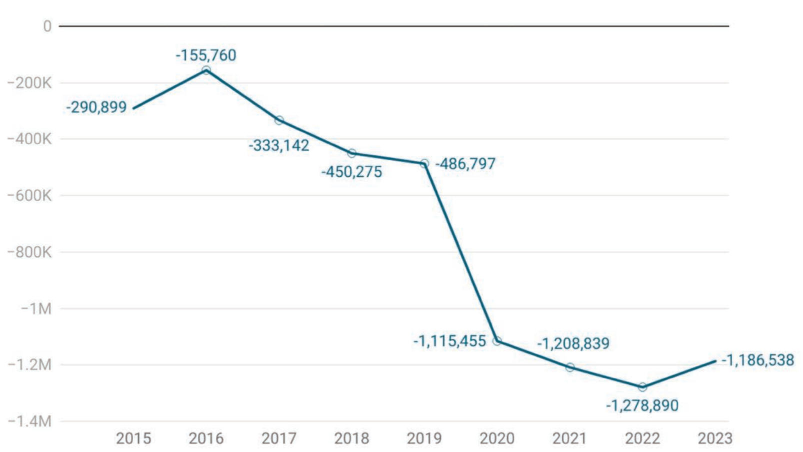
31 Eurostat, *Total Fertility Rate*, 2025.

32 *Ibid.*

33 Eurostat, *Life Expectancy at Birth by Sex*, June 2025.

34 Eurostat, *Population Change – Demographic Balance and Crude Rates at the National Level*, 2025.

Figure 2 - Evolution of the EU's net natural population balance



Reading: In 2023, the European Union's (27 countries) net natural population balance showed a deficit of 1, 186,538 individuals.

Chart: Action Committee for the Mediterranean

Source: Eurostat

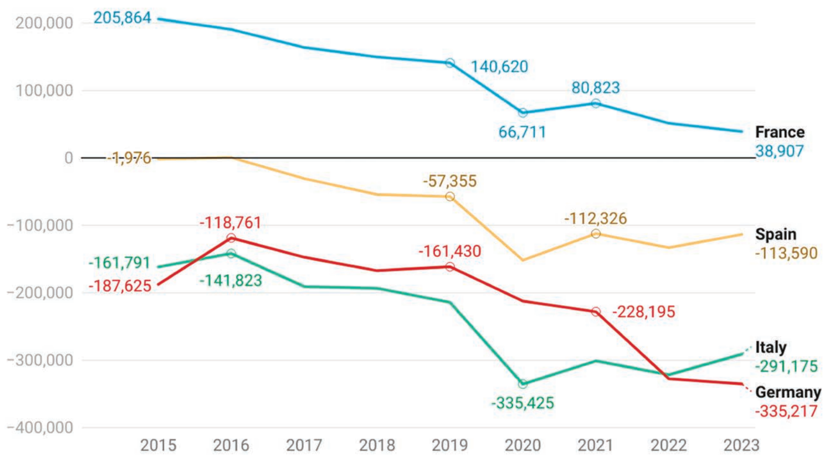
Created with Datawrapper

While the overall trend within the European Union is characterized by a declining natural balance, significant disparities persist among Member States. France constitutes a relative exception, maintaining a positive natural balance—albeit one that is clearly diminishing. It decreased from 205,864 in 2015 to 47,358 in 2023, and projections by INSEE indicate that France's natural balance will turn negative as early as 2027[35]. In addition to France, only five other EU countries—namely Ireland, Cyprus, Luxembourg, Sweden, and Malta—still recorded a marginally positive natural balance in 2023.

Conversely, Italy and Germany have experienced a persistently negative natural balance for over a decade and registered the most pronounced deficits in 2023. Italy recorded a natural population deficit of over 290,000 people in 2023, compared to 161,791 in 2015. In Germany, the deficit rose from 187,625 in 2015 to 335,217 in 2023[36].

Figure 3 - Evolution of the net population balance by country

Net natural balance: difference between the number of births and the number of deaths recorded over a given period.



Reading: In 2023, Spain's natural population balance showed a deficit of -113,590 individuals.

Chart: Action Committee for the Mediterranean

Source: Eurostat

Created with Datawrapper

35 Gilles Pison, Laurent Toulemon, *La population de la France va-t-elle diminuer ?, Population & Sociétés*, 2025, n° 631.

36 Eurostat, *Population Change – Demographic Balance and Crude Rates at National Level*, 2025.

This rapid and sustained decline in fertility is therefore having major consequences on the continent's demographic trajectory. In the medium to long term, it suggests a significant decrease in population. According to demographic projections—taking immigration into account—the European Union could lose over 460,000 inhabitants between 2025 and 2030, and more than 700,000 between 2030 and 2035[37]. Some countries are already experiencing population decline as early as 2023: Poland, for instance, recorded a decrease of 134,000 people, while Italy lost more than 28,000 inhabitants[38].

3.

Ageing of the European population: projections

The most immediate consequence of declining birth rates is not a shrinking population, but rather its ageing. Europe's demographic future will be marked by grey hair. This ageing process is reflected in a progressive inversion of the age pyramid, with the proportion of elderly people now exceeding that of younger generations. In 2024, there were nearly two million more people aged 65–74 than individuals aged 20–29 in the European Union[39].

More strikingly, the old-age dependency ratio (the number of people aged 65+ relative to those aged 15–64) rose to 33.9% in 2024, up from 27.7% in 2013. While there were nearly four working-age individuals for every person aged over 65 in 2013, this number has fallen to fewer than three today[40]. This trend underscores the increasing financial burden placed on the working-age population to support pension systems and long-term care for the elderly.

Once again, significant disparities persist across Member States. Italy is particularly affected, with a dependency ratio of 39% in 2025—among the highest in the EU—highlighting an elevated risk of economic strain due to the growing weight of the senior population on the labor force. Germany and France follow closely with dependency ratios of 35.7%, ahead of Spain at 31.9%.

This demographic ageing is expected to accelerate significantly by 2050. Spain is projected to experience the sharpest increase in dependency, with its ratio rising by 27 percentage points to reach 59%—a level comparable to the 61.3% forecast for Italy in the same year. In contrast, the increase in France and Germany is projected to be more moderate, with respective rises of 12 and 10 points (bringing the ratio to 48% in France and 45.7% in Germany)[41].

37 Eurostat, *Population on 1 January by age, sex and type of projection*, 2023.

38 Eurostat, *Population change – Demographic balance and crude rates at national level*, May 2025.

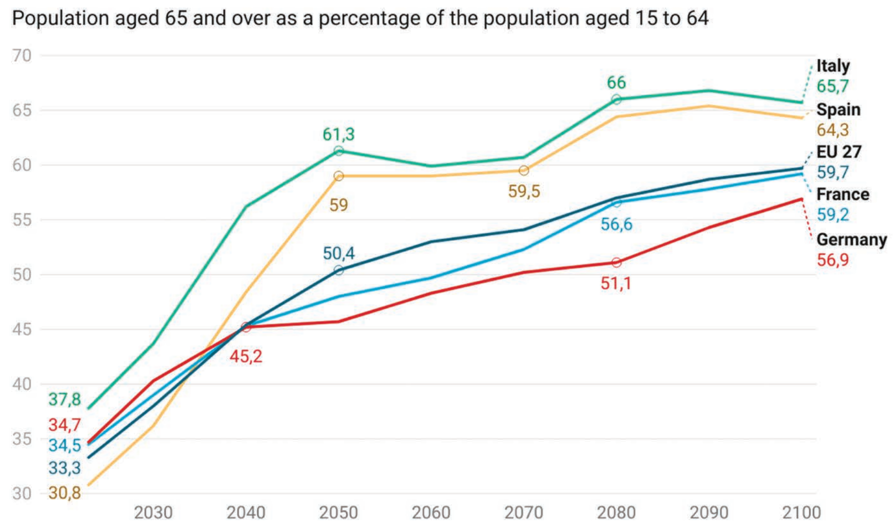
39 Eurostat, *Population on 1 January by age group and sex*, 2025.

40 Eurostat, *Old-age dependency ratio – Variant 1 (population aged 65 or over to population aged 15 to 64)*, 2023.

41 *Ibid*.

Two important caveats must be considered regarding these figures. Firstly, they are based on median immigration scenarios extrapolated from the previous five years, even though anti-immigration sentiment continues to gain momentum in both France and Germany. Secondly, the more moderate increase in dependency ratios in France and Germany should not be viewed with complacency: both countries will nevertheless face significant challenges in sustaining their pay-as-you-go pension systems.

Figure 4 - Projection of the Old-Age Dependency Ratio (in %)



Reading: In the European Union, the proportion of people aged over 65 compared to those aged 15-64 will reach 50.4% by 2050.

Graphique: Action Committee for the Mediterranean

Source: Eurostat

Créé avec Datawrapper

The corollary of this ageing is the decline in the number of young people. According to projections from the Eurostat database, assuming constant immigration levels, the number of people under the age of 20 in the European Union will fall from 91.512 million in 2025 to 82 million by 2050—a 10% decrease. Notably, under the no-migration scenario, the number of young people in the EU would decline by more than 20% by 2050, to 71.293 million[42].

C.
POPULATION PROJECTIONS IN THE EUROPEAN UNION DEPENDING ON IMMIGRATION

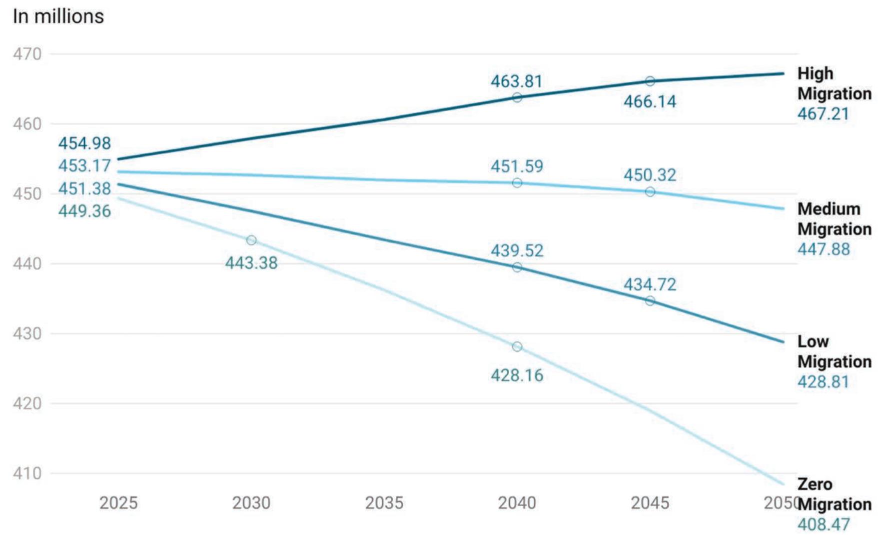
As we have seen, the natural balance in the European Union is declining by more than one million people per year; however, the central population estimate for the 27 Member States would decrease "only" from 453.168 million inhabitants in 2025 to 447.877 million in 2050[43]. These projections assume that immigration levels will be similar to those observed in recent years – that is, the years during which Germany welcomed over one million refugees from Syria and

42 Eurostat, *Population on 1 January by age, sex and type of projection*, 2023.

43 *Ibid.*

Iraq in 2015 and 2016, and then again around one million Ukrainians[44] since the start of the Russian aggression. It is therefore very important to emphasize that population stability depends almost entirely on immigration: in France itself, which remains Europe's fertility leader (after Bulgaria), immigration accounted for nearly three-quarters of the country's population growth in 2022[45].

Figure 5 - Population projections for the European Union (27 countries) under different scenarios



Reading: In 2050, under a low migration scenario, the population of the European Union will reach 428.81 million inhabitants.

Chart: Action Committee for the Mediterranean

Source: Eurostat

Créé avec Datawrapper

In short, the demographic future of the European Union depends on immigration. According to Eurostat's population projections excluding immigration[46], the EU population would decrease from 449.3 million in 2025 to 408.5 million in 2050 – a decline of over 40 million people, representing a -9.1% drop[47]. To grasp the magnitude of this decrease, one can recall that the First World War resulted in the death of 1.5 million French people[48] – about 3.8% of the 1914 population.

Some member states, particularly exposed to low birth rates, are all the more dependent on immigration. Under a no-migration scenario, Italy would see its population decline by 15.62% by 2050. Germany would experience a population decrease of 11.41%, while Spain would face a drop of 11.03% between 2025 and 2050[49]. In contrast, France would stand out for relative demographic stability, with a limited decrease of 0.8%; however, these projections must now

44 Anne Salles, « Marché du travail en Allemagne : quelle contribution des réfugiés d'Ukraine ? », *Revue d'Allemagne et des pays de langue allemande*, 55-2, 2023.

45 "Immigrés et descendants d'immigrés", INSEE, 2023 edition, March 2023.

46 These scenarios exclude all incoming or outgoing migration flows.

47 Eurostat, *Population on 1 January by age, sex and type of projection*, 2023.

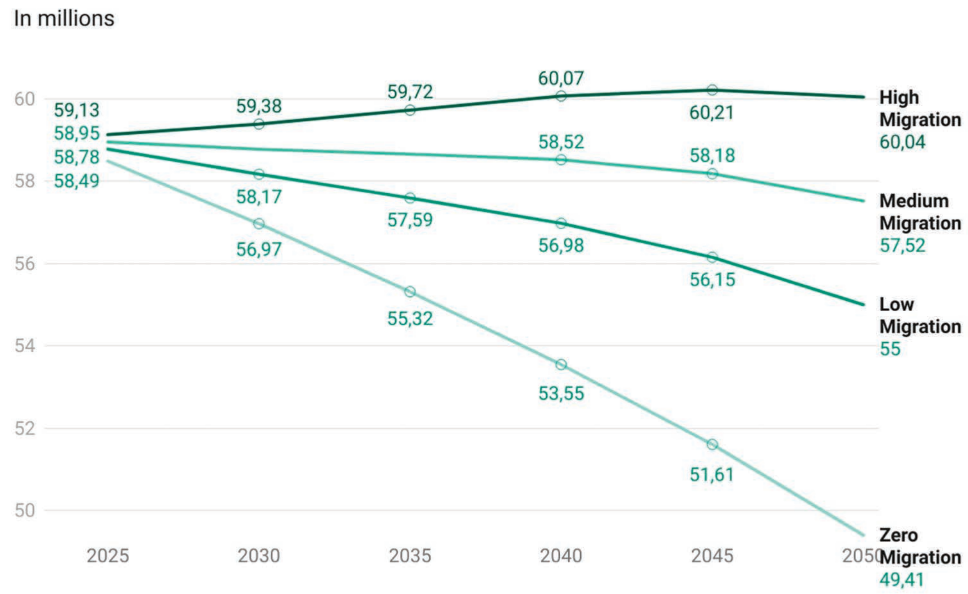
48 Jay Winter, « Victimes de la guerre : morts, blessés et invalides », in S. Audoin-Rouzeau et J.-J. Becker (dir.), Encyclopédie de la Grande Guerre, t. II, Perrin, 2e éd., 2012, p. 715-728. Voir aussi François Héran, « Générations sacrifiées : le bilan démographique de la Grande Guerre ». *Population & Sociétés*, 510(4), 1-4, 2014.

49 Eurostat, *Op. Cit.*

be adjusted to reflect the sharp decline in France's fertility rate, from nearly 1.8 when the projections were made in 2022 to 1.62 in 2024.

When a scenario incorporating average migration is considered — that is, assuming the continuation of migratory flows comparable to those observed in recent years — the demographic outlook for the European Union, while still concerning, appears less alarming. The effects of this assumption vary significantly depending on the country. Italy would continue to see its population decline (-2.43%), as would Germany (-0.46%), but to a much lesser extent than in the no-migration scenario. Spain, meanwhile, would experience positive growth, with an increase of 3.8% in its population by 2050. France would also see moderate demographic growth (+2.89%), confirming its unique position within the Union in terms of natural and migratory dynamics[50].

Figure 6 -Population Projections for Italy Under Different Scenarios



Reading: In 2050, under a low migration scenario, Italy's population will reach 55 million inhabitants.

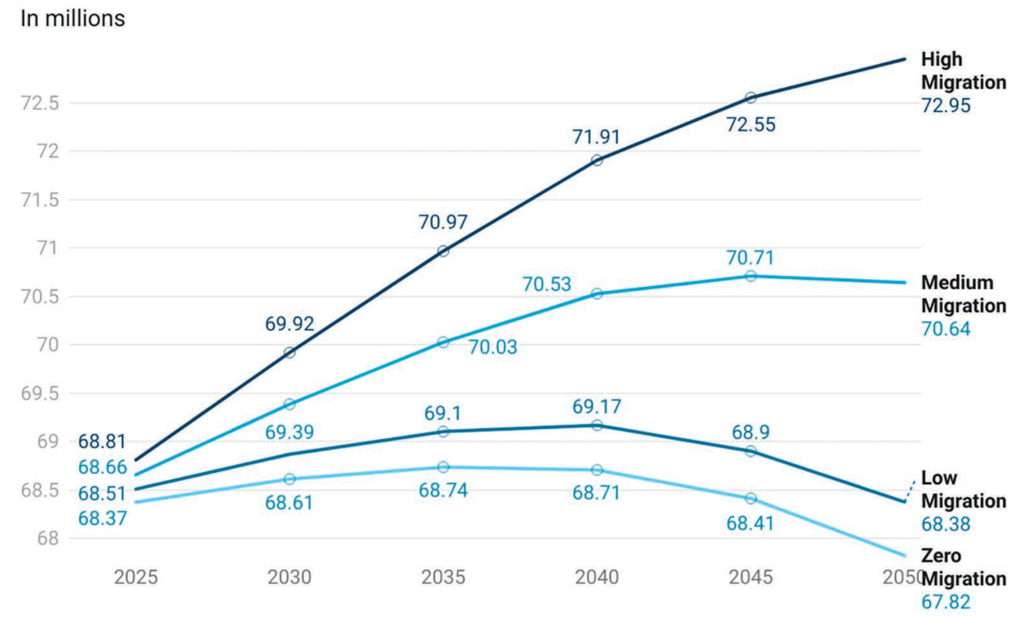
Graphique: Action Committee for the Mediterranean

Source: Eurostat

Créé avec Datawrapper

50 *Ibid.*

Figure 7 - Population Projections for France Under Different Scenarios



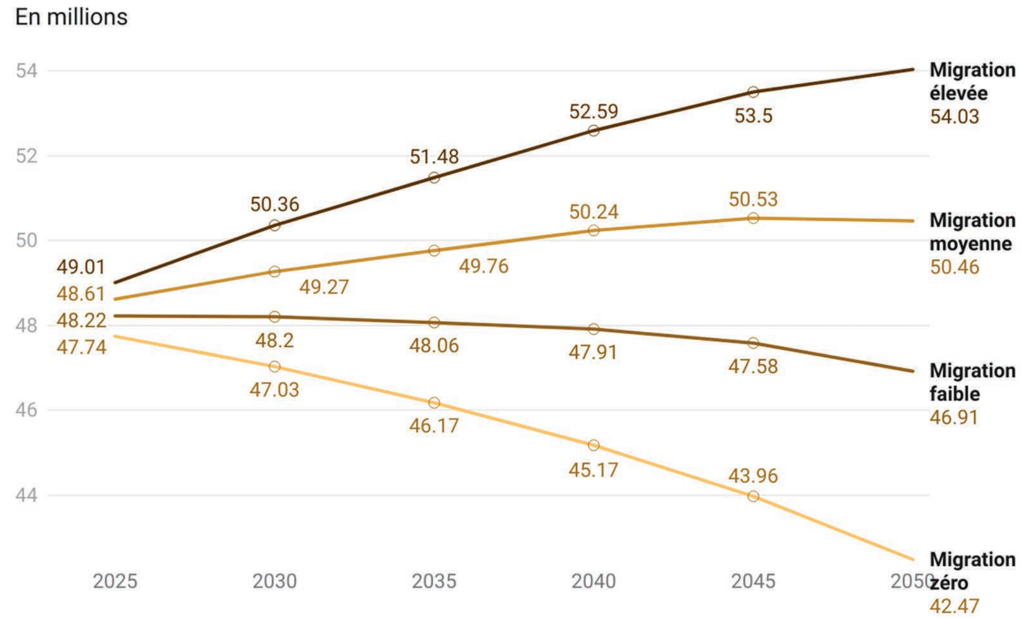
Reading: In 2050, under a low migration scenario, the population of France will reach 68.38 million inhabitants.

Graphique: Action Committee for the Mediterranean

Source: Eurostat

Créé avec Datawrapper

Figure 8 - Population Projections for Spain Under Different Scenarios



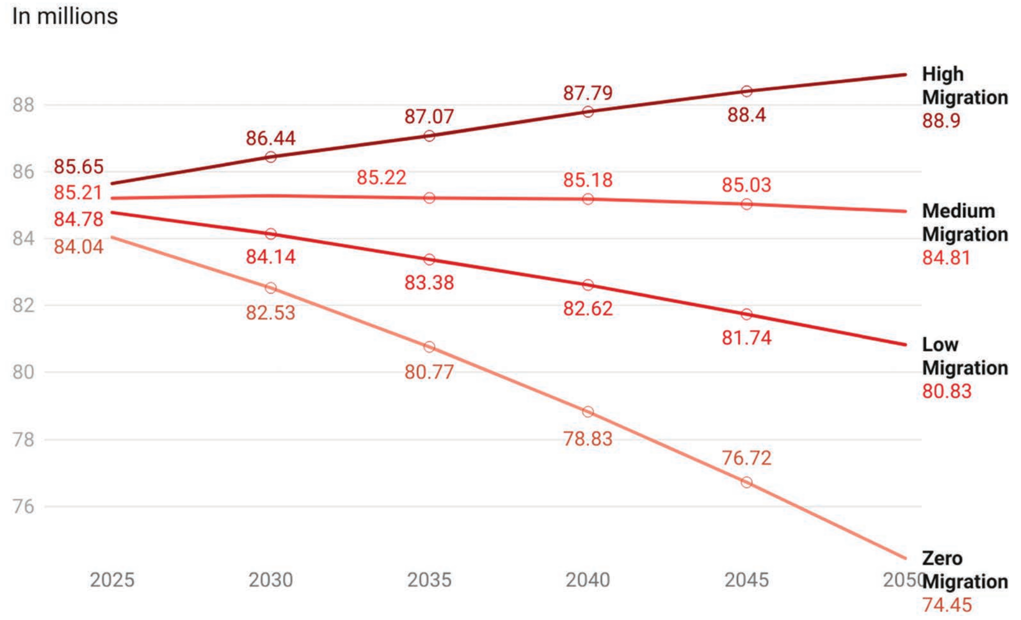
Reading: In 2050, under a low migration scenario, the population of Spain will reach 46,91 millions inhabitants.

Chart: Action Committee for the Mediterranean

Source: Eurostat

Créé avec Datawrapper

Figure 9 - Population Projections for Germany Under Different Scenarios



Reading: In 2050, under a low migration scenario, Spain's population will reach 80.83 million inhabitants.

Chart: Action Committee for the Mediterranean

Source: Eurostat

Créé avec Datawrapper

Moreover, in 2022, migrants coming from countries outside the European Union were mainly heading towards member states whose populations are projected to experience significant declines. Germany received 1.6 million of these migrants, representing 31% of all arrivals to the European Union. Spain received 860,000 arrivals, accounting for 17%, while Italy registered 334,000 arrivals (7%), the Czech Republic 331,000, and France 317,000. **This immigrant population within the European Union is characterized by a younger age structure than that of the native population. In 2023, among men who were non-nationals of the country in which they resided, 28% were aged between 20 and 49, compared to only 18% among nationals; among non-national women, this figure was 27%, versus 18% among nationals[51]. Immigration thus not only slows demographic decline but also counters its corollary, the aging of the population.**

Without immigration, the European population risks experiencing an irreversible decline; this prospect is all the more worrying as the drastic reduction of immigration is at the heart of political agendas in several countries on the northern shore of the Mediterranean.

51 Eurostat, *Migration and Asylum in Europe*, 2024.

D.

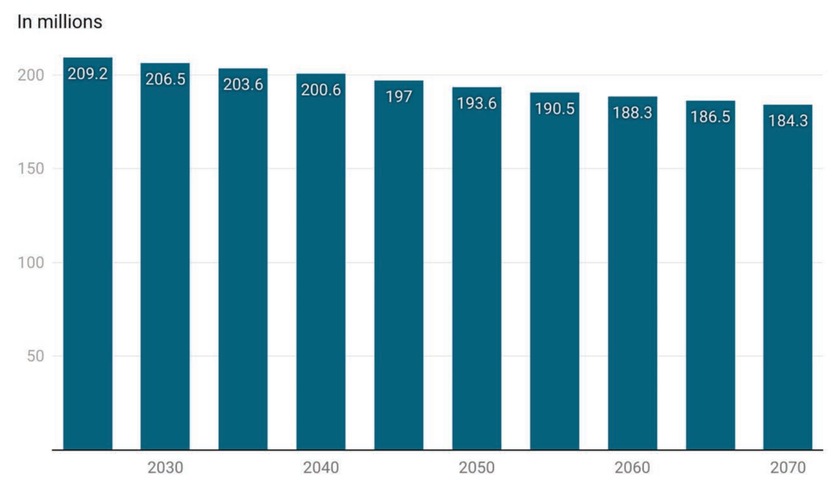
LOW BIRTH RATES COULD LEAD TO A SEVERE DECLINE IN THE EUROPEAN WORKFORCE

1.

All scenarios predict a decrease in the working-age population by 2050 or 2060

As we have seen, low birth rates first reduce the proportion of young people within the population; consequently, the working-age population decreases, putting European social models at risk, particularly pay-as-you-go pension systems. According to projections by the European Commission, the European Union could lose 15.63 million working-age people (aged 20 to 64) by 2050, and nearly 24.88 million by 2070[52].

Figure 10 - Projection of the Active Workforce at the European Union Level



Reading: In 2050, the active workforce of the European Union will comprise 193.6 million individuals.

Chart: Action Committee for the Mediterranean

Source: Ageing Report, 2024, European Commission

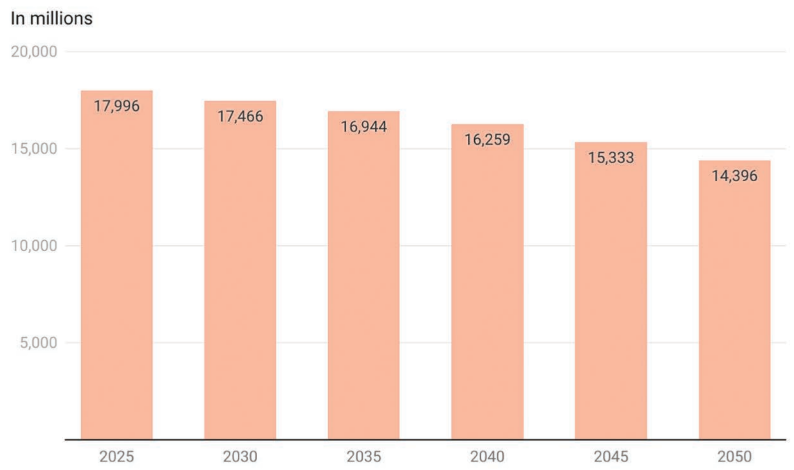
Créé avec Datawrapper

Some Eastern European countries are among the hardest hit by the decline in the active population and could see decreases of more than 20% by 2050. Poland would lose approximately 3.6 million workers, representing 20% of its active population between 2025 and 2050. Over the same period, Romania would see its active population shrink by more than 1.75 million people, also a 20% decrease, while Greece would experience a decline of 1.13 million workers—equivalent to 25% of its active population[53].

52 This projection assumes an increase in labor market participation from 79.4% in 2022 to 82.7% in 2070, driven by a combination of successive pension reforms and a rise in female participation in the workforce. These projections also rely on migration assumptions of one million people per year, representing 0.2% of the European Union's population (source: *European Commission, Ageing Report Economic & Budgetary Projections for the EU Member States 2022-2070*, 2024, pages 4 and 333. See also European Commission, 2024 Ageing Report, Underlying Assumptions and Projection Methodologies, notably p. 3). The migration level considered is median, excluding extraordinary international crises such as the war in Ukraine.

53 European Commission, *Ageing Report Economic & Budgetary Projections for the EU Member States 2022-2070*, 2024, p. 267, 306, 312.

Figure 11 - Projection of the Active Workforce for Poland



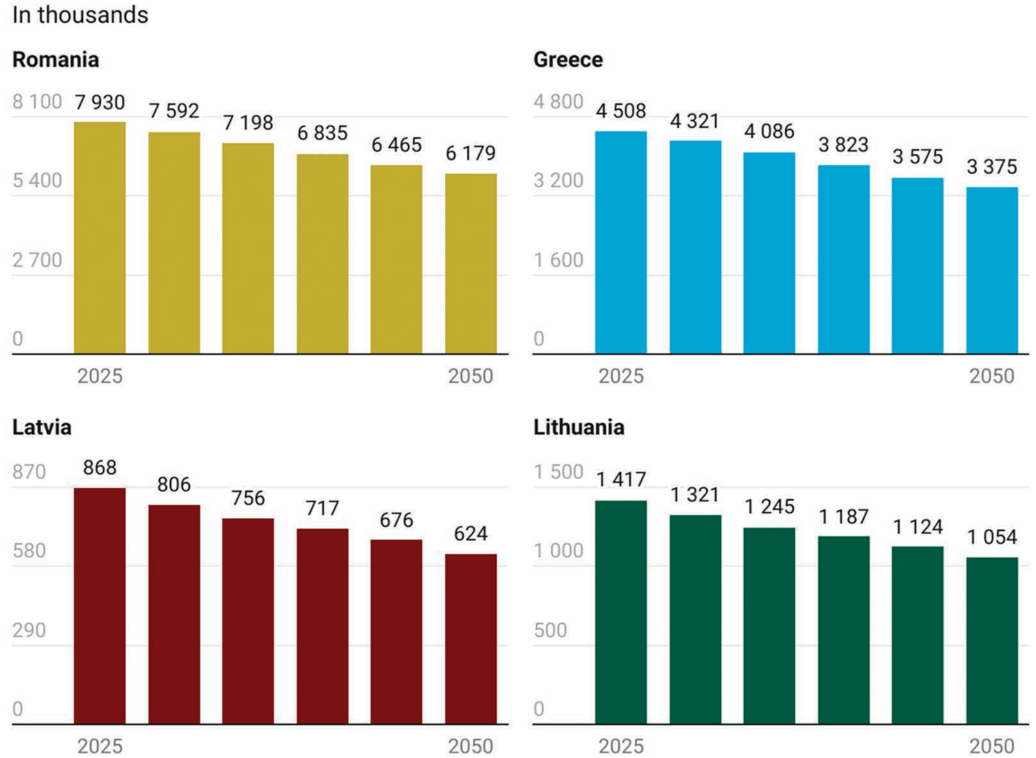
Reading: In 2050, Poland's active workforce will total 14.396 million individuals.

Chart:
Action Committee for the Mediterranean

Source:
Ageing Report, 2024, European Commission

Créé avec Datawrapper

Figure 12 - Projection of the Active Workforce



Reading: In 2050, Latvia's working-age population will include 624,000 individuals.

Graphique:
Action Committee for the Mediterranean

Source:
Ageing Report, 2024, European Commission

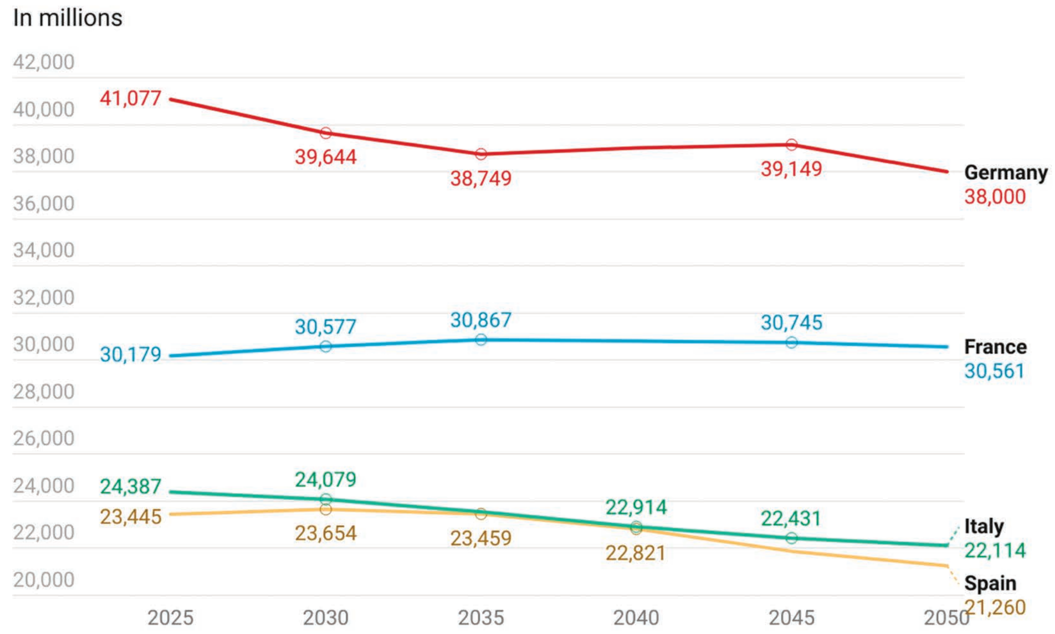
Créé avec Datawrapper

Other European economies will be particularly affected by the decline in the active population, notably Italy and Spain. In these two countries, the working-age population (20-64 years) has already stagnated since 2010 in Spain and since 2015 in Italy. Between 2025 and 2050, Italy will lose more than 2 million workers, dropping from 24.39 million in 2025 to 22.11 million in 2050, a decrease of 9.3%[54]. Spain will experience a similar decline of 7.7%, reducing its active population from 23.45 million to 21.26 million[55]. In Germany, the active population will decrease from 41.08 million in 2025 to 38.42 million in 2050, a decline of 5.8%[56]. France stands out as an exception, with a slight increase in its active population, rising from 30.179 million in 2025 to 30.561 million in 2050[57].

54 *Ibid.*p 185

It should be noted that these projections of the active population are based on a median migration scenario representing between 0.2% and 0.3% of the European population annually[58]. They also assume an increase in labor market participation from 79.4% in 2022 to 82.7% in 2070[59], due to a combination of successive pension reforms and a rise in female participation.

Figure 13 - Working-age population projection



Reading: In 2050, Spain's working-age population will comprise 21.26 million individuals.

Chart:
Action Committee for the Mediterranean

Source:
Ageing Report, 2024, European Commission

Créé avec Datawrapper

55 *Ibid.*

56 *Ibid.*

57 *Ibid.*

58 For detailed calculations of the projections, see the 2024 Ageing Report, Underlying Assumptions and Projection Methodologies, particularly pages 4 and 20.

59 *Ibid.* p186

Figure 14 - Projection of the Working-Age Population in European Union Member States

In thousands

	2025	2030	2035	2040	2045	2050
Allemagne	41 077	39 644	38 749	39 013	39 149	38 000
Autriche	4 441	4 403	4 398	4 428	4 441	4 410
Belgique	5 271	5 323	5 418	5 489	5 509	5 506
Bulgarie	3 104	2 944	2 812	2 672	2 528	2 393
Chypres	482	480	481	480	479	474
Croatie	1 671	1 628	1 595	1 548	1 491	1 436
Danemark	2 882	2 883	2 861	2 849	2 864	2 910
Espagne	23 445	23 654	23 459	22 821	21 874	21 260
Estonie	682	675	670	668	660	644
Finlande	2 618	2 584	2 599	2 608	2 579	2 525
France	30 179	30 577	30 867	30 803	30 745	30 561
Grèce	4 508	4 321	4 086	3 823	3 575	3 375
Hongrie	4 819	4 797	4 679	4 515	4 371	4 299
Irlande	2 559	2 688	2 797	2 841	2 822	2 791
Italie	24 387	24 079	23 547	22 914	22 431	22 114
Lettonie	868	806	756	717	676	624
Lituanie	1 417	1 321	1 245	1 187	1 124	1 054
Luxembourg	346	366	382	395	403	407
Malte	301	338	369	390	401	402
Norvège	2 683	2 750	2 812	2 862	2 908	2 936
Pays Bas	9 033	9 004	8 960	8 992	9 076	9 152
Pologne	17 996	17 466	16 944	16 259	15 333	14 396
Portugal	4 955	4 787	4 601	4 374	4 174	4 056
République Tchèque	5 231	5 133	5 052	4 870	4 714	4 627
Roumanie	7 930	7 592	7 198	6 835	6 465	6 179
Slovaquie	2 710	2 613	2 534	2 437	2 333	2 233
Slovénie	1 009	993	988	981	957	927
Suède	5 286	5 436	5 578	5 740	5 867	5 945

Reading:
In 2050, the working-age population of Poland will number 14.396 million individuals.

Tableau :
Action Committee for the Mediterranean

Source:
Ageing Report, 2024, European Commission

Créé avec Datawrapper

In the long term, the European labor market will be profoundly unbalanced: the share of young people of working age is gradually decreasing, while the proportion of elderly people continues to rise. The age pyramid, which was still favorable in the 1960s, is now reversing, giving an increasing place to seniors. In 2024, the median age of the European Union population was 44.7 years, compared to 39.3 years in 2004 and 35.2 years in 1990[60]. This trend affects all member states, but some countries are more affected than others. Italy, with a median age of 48.7 years in 2024 compared to 40.1 years in 2000 and 36.9 years in 1990, presents the most worrying demographic profile in the Union. Conversely, Ireland has the youngest population, with a median age of 39.4 years in 2024[61].

60 Eurostat, *Population Structure Indicators at the National Level*, 2025.
61 *Ibid*.

2.

Immigration will play an increasingly decisive role in the working-age population in Europe

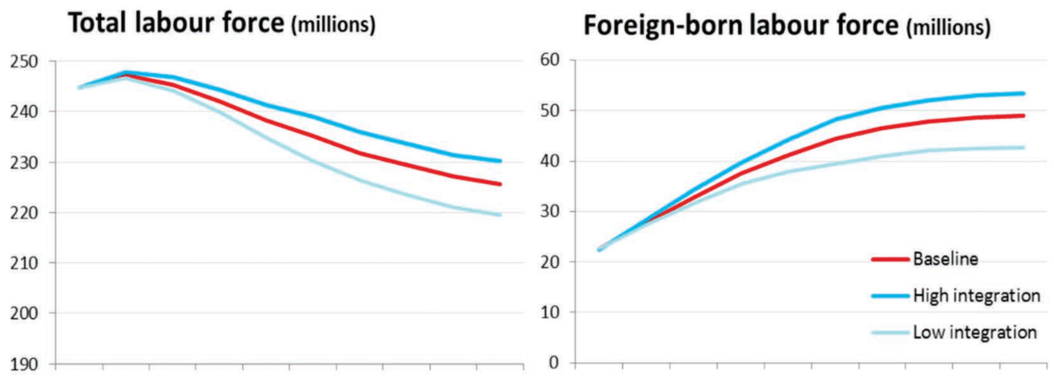
This increase in the median age is reflected in the working-age population: if current migration levels are maintained, the number of people aged 15-64 in the European Union is expected to fall from 287.535 million in 2025 to 257.212 million by 2050; this represents a decline of 10.5%[62]. The population projection without migration is much more alarming: the number would fall to 227.709 million aged 15-64, a decrease of 20%[63]. Thus, without migration, the working-age population in the EU would decrease by more than 20% by 2050 — compared to a 10.5% drop with migration.

Once again, some countries are more exposed to this risk of a shrinking workforce than others: in Italy, without immigration, the working-age population (15-64 years) would drop from 36.942 million in 2025 to 25.541 million in 2050; this would represent a decline of nearly 31% in the working-age population over 25 years[64]. Under the current migration scenario, the number of 15–64-year-olds would decrease "only" by around 15% between 2025 and 2050[65]. In Spain, while the median migration scenario forecasts a 12.7% drop in the 15-64 age group by 2050, projections without immigration predict a collapse of 29.2% in this group.

Given these statistics, the European Commission anticipates that the share of foreign-born workers in the active population will increase significantly in the coming years. One report, for example, estimates that the share of foreign-born individuals aged 15-74 could rise from about 22.5 million in 2015 (roughly 9% of the total active population) to nearly 49 million by 2060, for a projected active population of 226 million — that is, 21.7% of the total active population[66].

62 Eurostat, Population on January 1st by age, sex, and type of projection, 2023.
63 *Ibid*.
64 *Ibid*.
65 Eurostat, *Op. Cit*.
66 These calculations are based on data from the JRC Technical Report, Scenarios of Labor Force Participation and Employment Integration of Immigrants in the EU: Demographic Perspective, European Commission, 2020, p. 22.

Figure 15 - Total working-age population and foreign-born population in the EU from 2015 to 2060, by projection scenario



To counteract the effects of declining birth rates on the working-age population, immigration is neither the only solution nor a cure-all. Immigrant workers also eventually retire, thereby adding to the aging population much faster than cohorts of newborns would. Therefore, reviving birth rates would be far more beneficial for the age pyramid and, ultimately, for European social models than relying solely on immigration.

Moreover, several policy measures can be implemented to mitigate the impact of a shrinking workforce, even if they cannot fully reverse it. First, increasing labor market participation is possible through pension reforms as well as incentive programs—especially targeting women and young people. Second, some countries like Japan, which faces the world's longest period of low fertility, rely heavily on automation to address labor shortages.

As we will demonstrate in the following section, natalist policies, labor market engagement strategies, and automation must all be pursued to combat the consequences of low birth rates. Yet, let's be clear from the outset: although these policies are necessary, they are far from sufficient, and immigration remains the key factor in sustaining European economies and social models over the next twenty-five years.

II. Complementary Instruments in the Fight Against Depopulation: Labor Market Engagement, Pro-Natalist Policies, and Automation

Depopulation generates a set of demographic effects that directly undermine the economic and political health of a country: population decline, population ageing, and a shrinking labor force. But why should these phenomena be considered detrimental? One could, from a neo-Malthusian perspective, view the reduction in the number of workers as a potential opportunity[67]. Yet today, depopulation is widely regarded as a structural threat. The reason is simple: the lower the birth rate, the heavier the burden of pensions and long-term care becomes—especially as that burden falls on an increasingly diminished and fragile working population. The Malthusian argument has been overtaken by reality.

Moreover, younger generations are increasingly disadvantaged in the distribution of national income. Their earnings grow at a slower pace than those of seniors, raising concerns that ageing electorates in democratic societies may progressively allocate public resources to older cohorts rather than investing in the future. Indeed, between the mid-1980s and the mid-2010s, the real income of those aged 60 to 64 increased by 13.5% more than that of those aged 30 to 34 across OECD countries. The gap was even greater in Germany (20%), Spain and Italy (25%), and France (30%)[68]. This trend is particularly alarming given the urgent need to invest in younger generations and in green industries—especially as major geopolitical powers such as the United States and China are massively financing the environmental transition and advanced technologies.

Three categories of public policy can be mobilised to address declining birth rates: raising labor force participation rates—particularly among women, youth, and older workers; implementing pro-natalist measures; and promoting automation and robotics. While these three strategies should be pursued in parallel, none can substitute for immigration, which—despite increasingly vocal criticism in many European democracies—remains by far the most effective lever in the fight against demographic decline.

67 In their controversial book *La Bombe P* (1968), Paul and Anne Ehrlich advocated for neo-Malthusian measures to reduce population growth in order to achieve a more efficient allocation of the Earth's resources.

68 OCDE, *Preventing Ageing Unequally*, 2017, p. 28.

A.

THE NEED TO INCREASE LABOR FORCE PARTICIPATION TO SUSTAIN EUROPE'S ACTIVE POPULATION

Raising the labor force participation rates of women, young people, and older adults represents a potential response to the contraction of the working-age population in Europe. These dynamics—driven by policies aimed at promoting inclusion and extending working lives—can help slow the decline in the number of active workers. However, they will not, on their own, be sufficient to offset the structural decrease in the population of working age. Even with increased participation from these groups and a delay in the average retirement age, projections still point to a marked decline in the number of active workers in the European Union as early as 2050.

1.

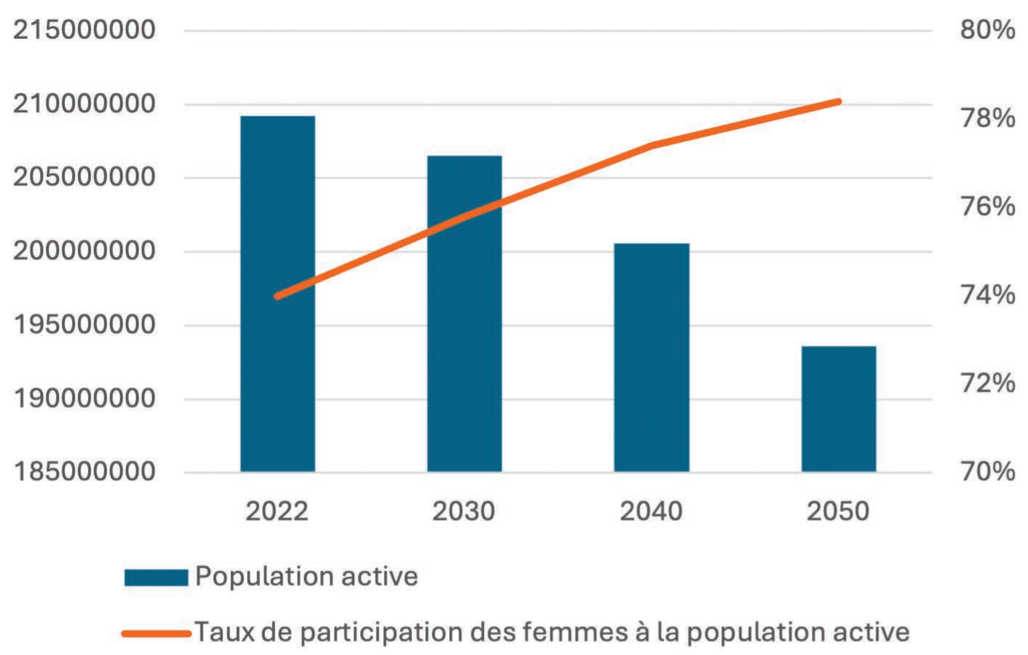
Female Labor Force Participation

As the European Union's active population contracts, the labor force participation rate among women continues to rise significantly. It stood at 74% in 2022 and is projected to reach 78.4% by 2050, marking an increase of 4.2 percentage points. Over the same period, the average age at which women exit the labor market is expected to rise from 63.5 to 65.1 years. However, these increases are insufficient to offset the overall decline in the working-age population[69]. Admittedly, countries such as Italy—where only 60.5%[70] of working-age women participated in the labor force in 2023, approximately 10 to 11 points below the EU average—have considerable room for improvement. Yet in other member states, such as the Netherlands (81.5%), Germany (79%), and France (76.3%), female participation rates were already high in 2024, exceeding the average for high-income countries, which stands at 70%[71]. This limits the potential for significant further progress[72].

Moreover, the increase in female labor force participation yields a virtuous effect in terms of fertility. Research shows that fertility rates tend to be more resilient in countries where women's participation in the labor market is higher[73]. This correlation may be explained by the fact that women's employment does not diminish their desire to have children but instead enhances household income, making it more feasible to support the education and upbringing of one or more children. As such, higher female participation contributes both to sustaining the active population and to supporting birth rates.

Nonetheless, even with increases in participation among women, young people, and older adults—and assuming a continuation of current immigration scenarios—these efforts will not be sufficient to prevent the decline of the active population. According to central projections, the European Union is still expected to have at least 15.63 million fewer working-age individuals by 2050, representing a 7.5% decrease compared to 2025[74].

Figure 16 - Projection of the female labor force participation rate (ages 20-64) (in %), and evolution of the active population



Action Committee for the Mediterranean

Source: Ageing Report, 2024, European Commission

69 European Commission, *Op. cit.*

70 European Commission, *Op. cit.*

71 World Bank, *Labor force participation rate, female* (% of female population ages 15-64) (modeled LO estimate), 2024.

72 World Bank Group, *Migrants, Refugees, and Societies*, 2023, p 315

73 Maxime Sbaihi, *Les Balançoires vides. Le piège de la dénatalité*, Éditions de l'Observatoire, 2025, p. 108.

74 European Commission, *Op. cit.*

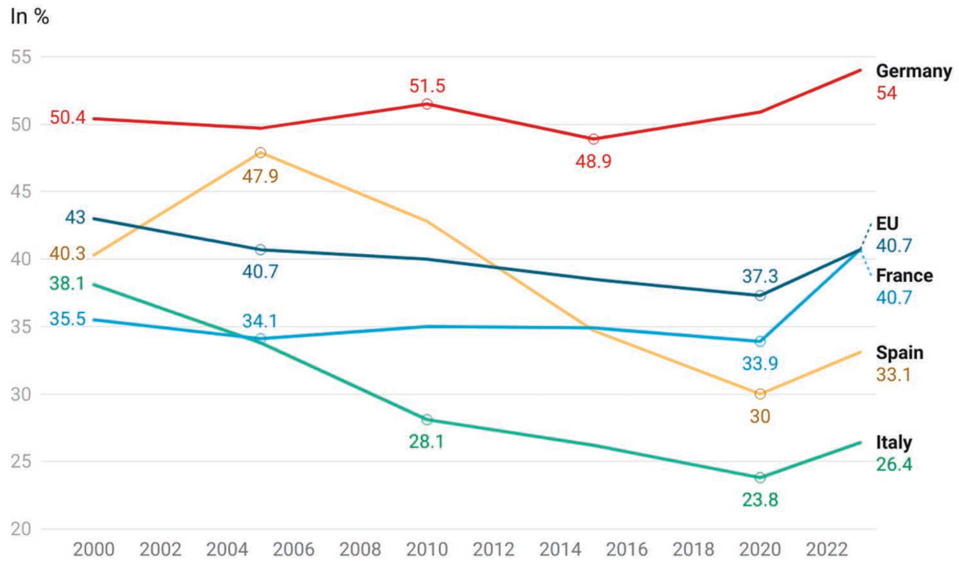
2.

Youth Labor Force Participation Rate

Since the early 2000s, the labor force participation rate among 15–24-year-olds in the European Union has declined, primarily due to the extension of educational trajectories[75]. However, projections indicate a modest increase in the participation of young people aged 20 to 24 in the labor market, rising from 61.6% in 2025 to 63.8% by 2050[76]. This trend challenges the prevailing notion that longer periods of education necessarily delay entry into the workforce: mechanisms such as apprenticeships allow for a simultaneous extension of formal education and earlier labor market integration. In France, for instance, the number of apprentices has increased from approximately 400,000 in 2010 to over one million in 2023[77]. Apprentices now constitute 2.5% of the national workforce, compared to 5.6% in Germany[78].

Significant disparities nevertheless persist across member states. Some countries, such as Italy, record particularly low youth labor force participation rates. In 2022, only 22.5% of Italians aged 20 to 24 were active in the labor market. Projections suggest a notable improvement, with the rate expected to reach 45.5% by 2050. Yet this figure would still remain well below that of Germany, where 73.6% of individuals in the same age group were already participating in 2022—a rate forecast to rise marginally to 74% by mid-century[79].

Figure 17 - Labor force participation of 15-24 year-olds



Reading: In 2023, the labor force participation rate of young people aged 15 to 24 in the European Union stands at 40.7%, down from 43% in 2000.

Chart: Action Committee for the Mediterranean

Source: Banque Mondiale

Créé avec Datawrapper

75 World Bank, *Labor Force Participation Rate of 15–24-Year-Olds (%).*

76 European Commission, *Op. cit.*

77 « Effectifs d'apprentis en fonction du diplôme préparé, données annuelles de 2000 à 2023 », *INSEE*, 6 november 2024.

78 « Apprentissage, la France dépense 12 milliards de plus que l'Allemagne », *Fondation IFRAP,* September 2023.

79 *Ibid*. It should be noted that while Germany remains the European leader in apprenticeship training, the number of apprentices there is now declining, as young people increasingly favour higher education. The trend is reversed in France.

3.

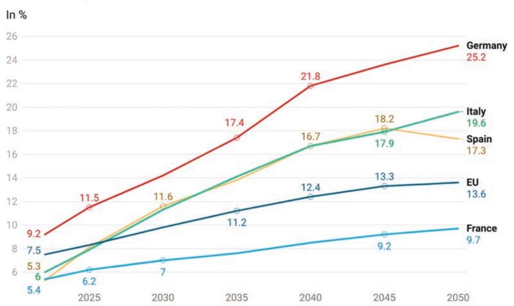
Labor Force Participation Rate of Individuals Aged 65-74

As their populations age, European states are increasingly seeking to reform pension systems to alleviate the financial burden posed by ageing on a shrinking working-age population. According to the 2024 Ageing Report of the European Commission, the participation rate of older workers aged 65 to 74 is expected to rise by 2050 — from 7.5% to 13.6% among women, and from 13.4% to 16.6% among men. While this increase in senior labor force participation may contribute to the sustainability of pension systems, the overall participation rate for this age group would still reach only 15.1% in 2050, up from 10.2% in 2022 — a level that remains insufficient to meet the European labor market's needs[80].

Moreover, these projections presuppose that European countries will undertake pension reforms by 2050. Yet, such reforms do not necessarily result in a substantial rise in senior participation rates, as many individuals exit the labor force prior to reaching the statutory retirement age — either due to involuntary exit from employment or by deliberate choice.

It is thus essential to raise the participation rates of young people, women, and older workers in order to mitigate the decline of the European labor force. Increasing women's participation is particularly valuable, as it can simultaneously support demographic renewal by contributing to higher birth rates. Nevertheless, even under projections that integrate these three upward trends, the working-age population in the European Union is expected to decline by 7.5% by 2050, assuming constant migration levels.

Figure 18
Projected labor force participation rate of women aged 65 to 74



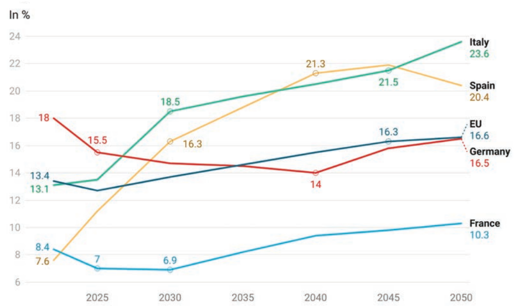
Reading: The labor force participation rate of Spanish women aged 65 to 74 is expected to reach 17.3% by 2050.

Chart: Action Committee for the Mediterranean

Source: Ageing Report, 2024, European Commission

Créé avec Datawrapper

Figure 19
Projected labor force participation rate of men aged 65 to 74



Reading: The labor force participation rate of Italian men aged 65 to 74 is projected to reach 23.6% by 2050.

Chart: Action Committee for the Mediterranean

Source: Ageing Report, 2024, European Commission

Créé avec Datawrapper

80 European Commission, *Op. cit.*

B.

PRO-NATALIST POLICIES AND THEIR DELAYED AND UNCERTAIN IMPACT: A BROAD OVERVIEW

Fertility rates tend to be more resilient in countries that implement pro-natalist policies; however, such policies cannot, as some governments claim, serve as substitutes for immigration. The effectiveness of incentive-based measures remains highly debatable. These policies often fail to significantly boost fertility rates, and even more rarely do they succeed in raising them above the replacement threshold.

1.

Financial Incentive Policies

Let us begin with an axiom: no one has a child because of a tax incentive. Camille Landais has notably demonstrated, in the case of France, that the introduction in 1980 of an additional tax allowance starting with the third child did not alter the proportion of families with three or more children in French society[81]. According to the OECD Family Database, in 2021 the average share of GDP allocated to family policies within the European Union was 2.65%, ranging from 1.69% in Greece—with equally low levels in Italy and Spain (1.86% and 1.87% respectively)—to 3.63% in Poland, followed closely by Germany and France (3.46% and 3.38% respectively)[82].

There is, to begin with, a positive correlation between the financial transfers provided by the state and fertility rates: fertility tends to be more resilient in countries where public spending on families is higher[83]. Nevertheless, the impact of public policies on fertility remains both limited and unpredictable. Limited, first of all: family policy can only increase fertility rates by a few tenths of a point[84]. For example, research has shown that French family policy spending—covering 16% of the total cost of raising a child[85]—can be associated with an increase of only 0.2 additional children per woman. Unpredictable, secondly: Hungary under Viktor Orbán has recently announced a wide range of pro-natalist measures across multiple sectors (see inset below). According to various estimates, Hungary now devotes between 3% (OECD, 2021) and 6.2% (Daily News Hungary, 2021) of its GDP to family policy. Yet, since these measures were introduced, fertility has not risen above 1.5 children per woman. Research indicates that such policies often lack clarity and long-term credibility in the eyes of citizens, who are reluctant to base life decisions on government announcements perceived as reversible[86]. As shown in the graph below, Viktor Orbán's pro-natalist policies did not prevent a sharp decline in Hungary's fertility rate—from 1.61 children per woman in 2021[87] to 1.38 in 2024[88].

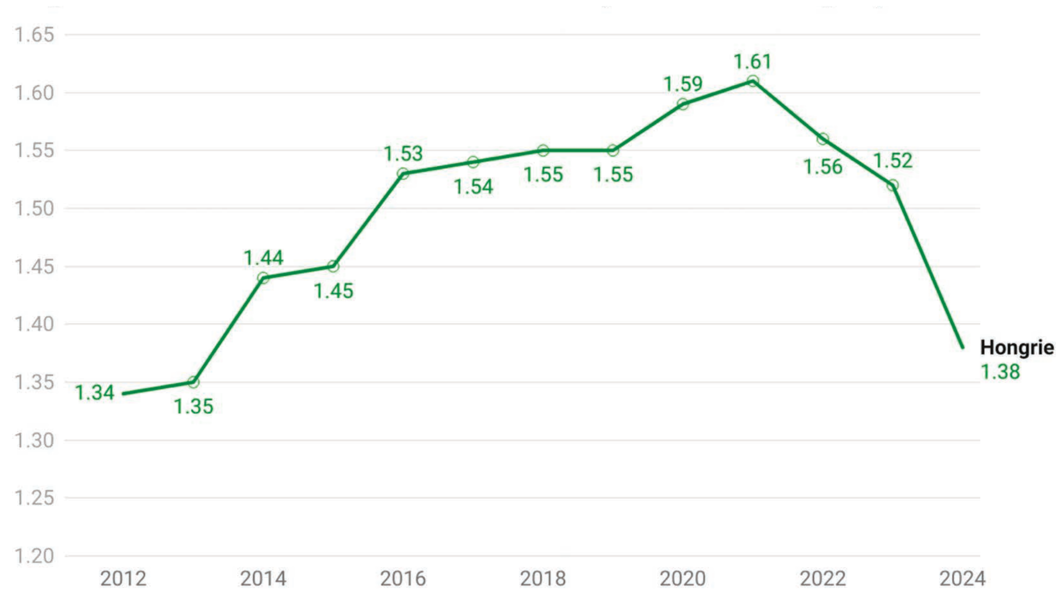
Figure 20 - Evolution of the fertility rate in Hungary

Reading: In 2023, the fertility rate in Hungary was 1.52 children per woman.

Chart: Action Committee for the Mediterranean

Source : Eurostat & Office central des statistiques de Hongrie

Créé avec Datawrapper



81 Camille Landais, *Le quotient familial a-t-il stimulé la natalité française ?,* DEA Analyse et Politiques Economiques, EHESS, 2003, P. 37-40.

82 OECD Family Database.

83 *Ibid.*

84 Sobotka, T., Matysiak, A., & Brzozowska, Z. *Policy Responses to Low Fertility: How Effective Are They?* UNFPA Working Paper, 2019, p. 50.

85 Ekert, O. (1986). "Effects and Limits of Financial Support for Families: An Experience and a Model." *Population*, No. 41: 327–348. See also Gilles Le Garrec, "Fertility and Financial Support to Families in the European Union: An Overview of the Data," *OFCE Le Blog*, January 2024.

86 Spéder, Zsolt. (2016). "Fertility Decline and the Persistence of Low Fertility in a Changing Policy Environment—A Hungarian Case Study." *In Low Fertility, Institutions, and their Policies: Variations Across Industrialized Countries,* edited by Ronald R. Rindfuss and Minja Kim Choe, 165–194. Cham: Springer International Publishing.

87 Eurostat, *Total Fertility Rate,* 2025.

88 Hungarian Central Statistical Office, December 2024.

Pro-natalist Policies in Viktor Orbán's Hungary and Their Limited Impact

Upon arriving at Budapest airport, a multilingual sign boldly declares: "Hungary, the country of families." This message reflects the Hungarian government's proactive approach to promoting childbirth, particularly since 2019. A suite of generous fiscal incentives has been introduced for mothers: lifetime income tax exemption for women with four or more children; immediate exemption for those with three; a phased exemption between 2026 and 2029 for mothers with two or more children; and tax exemption for all mothers under the age of 30. Beyond fiscal measures, the state offers financial support for family formation: newlywed couples are eligible for loans of approximately €31,000, which are converted into grants if they have at least three children. In addition, the government subsidizes up to €7,800 toward the purchase of seven-seater vehicles for families with three or more children. Family allowances have been raised, and parents of more than two children are granted additional paid leave. The government has also significantly expanded childcare facilities across the country.

Prime Minister Viktor Orbán has publicly justified these policies by asserting that, unlike Western European nations, Hungary seeks to reverse its demographic decline with "Hungarian children," not immigrants. However, the dichotomy he posits between family policy and immigration proves misleading. Despite the broad array of measures, the country's fertility rate plummeted from 1.61 children per woman in 2021 to 1.38 in 2024. More alarmingly, Hungary's population, according to Eurostat, could decrease from 9.644 million in 2022 to 9.230 million by 2050—a 4.3% drop even when accounting for immigration. The United Nations offers an even more pessimistic projection, estimating a decline to 8.725 million by 2050 due to the shrinking number of women of childbearing age.

Hungary thus appears caught in what demographers call the "low fertility trap," whereby the sustained fall in birth rates eventually reduces the base of women capable of having children, compounding the demographic crisis despite aggressive public policy interventions.

2.

The Expansion of Childcare Services: The Most Effective Public Policy for Reviving Fertility

The academic literature overwhelmingly supports a strong correlation between access to childcare services and couples' willingness to have children. This link has been extensively studied in countries such as Belgium[89] and Spain[90]. As previously noted, a 10% increase in childcare coverage in Norway led to a 0.1-point rise in the fertility rate. Conversely, insufficient childcare availability can significantly depress birth rates. In France, it is estimated that around 160,000 parents are unable to return to work after the birth of a child due to the lack of accessible childcare[91]—a burden many families either cannot or will not accept. Anyone who has experienced the opaque and unpredictable allocation processes for crèche places in major metropolitan areas knows how fragile a return to professional life can be for young parents.

Among all public policies aimed at boosting fertility, the establishment of widespread childcare services appears to be the most reliable and effective. Moreover, such policies are instrumental in advancing gender equality, as it is still predominantly mothers who are forced to interrupt or even abandon their careers after childbirth.

Germany, for example, introduced a legally enforceable right to childcare for children under the age of three in 2013, a move now being debated in France. However, as highlighted in a March 2022 opinion issued by the French Economic, Social and Environmental Council (CESE), *"beyond this enforceable right, Germany made massive investments in the training of early childhood professionals, allocating €11.2 billion in 2017—equivalent to 0.3% of GDP—and recruiting more than 600,000 staff members"*[92]. This level of budgetary commitment is essential for meaningful progress.

Yet this policy faces a significant constraint: the recruitment of qualified childcare professionals. Across Europe, the early childhood sector is grappling with severe labor shortages—a challenge that, at present, is mitigated primarily through immigration. Without addressing this structural issue, even the most ambitious childcare strategies will fall short of their potential to support working families and reverse declining fertility trends.

89 Jonas Wood and Karen Neels, "*Local Childcare Availability and Dual-Earner Fertility: Variation in Childcare Coverage and Birth Hazards Over Place and Time*", *European Journal of Population*, 2019.

90 Pau Baizan, "*Regional Child Care Availability and Fertility Decisions in Spain*", *Demographic Research*, 2009.

91 Maxime Sbaihi, *Op. cit.*, p. 185.

92 Avis du CESE 22 mars 2022, Vers un service public de la petite enfance, p. 22.

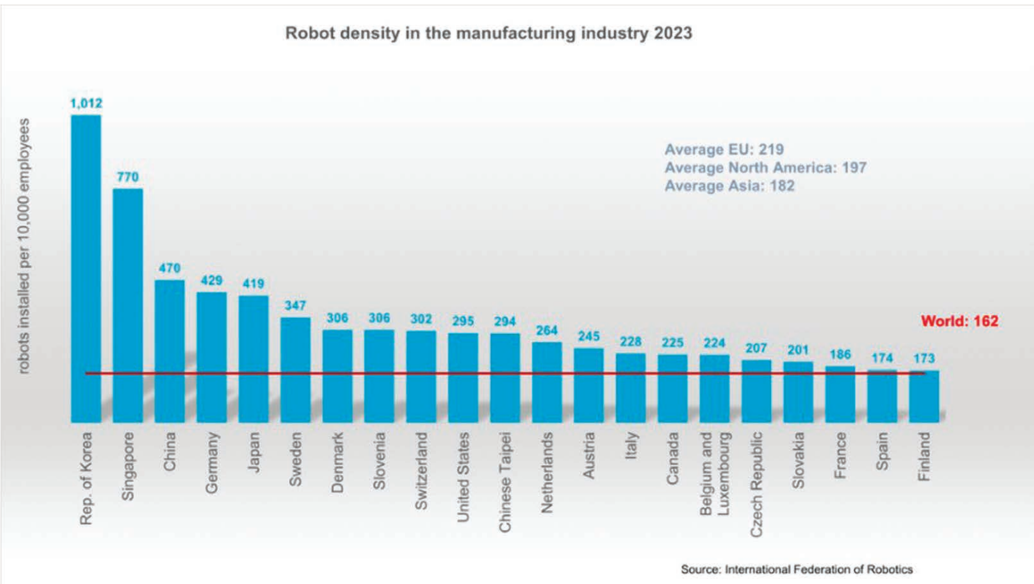
C.

CAN ROBOTICS COUNTER DEPOPULATION?

Given the often negative public perception of immigration, some governments, rather than confronting public opinion by facilitating the arrival of foreign workers, have opted to automate large segments of their economies. Japan is the most emblematic case: its fertility rate has remained continuously below 2.05 children per woman since 1974[93], leading to severe labor shortages. By early 2024, the country faced 120 job openings for every 100 active workers[94]. Even though men work on average until the age of 68 and women until 67, Japan is projected to face a shortfall of 3 million workers by 2030 and 11 million by 2040[95].

Confronted with such acute shortages, the Japanese government has taken a distinctive path: instead of relying on foreign labor, which it is reluctant to integrate, it has prioritized automation and robotics. A scholarly study has demonstrated that, in the case of Denmark, robotics can function as a substitute for immigration: the greater the number of robots in a given sector, the fewer migrant workers are employed there[96]. As illustrated in the figure below, levels of automation are generally higher in industrialized countries that are experiencing labor shortages.

Figure 21 - Robot density in the manufacturing industry in 2023



93 James M. Raymo, "The Second Demographic Transition in Japan: A Review of the Evidence," *China Population and Development Studies*, vol. 6, 2022, pp. 267–287.

94 Philippe Escande, "Faute de bras, l'immigration est en hausse constante au Japon," *Le Monde*, 30 January 2024.

95 Maxime Sbaihi, *Op. Cit.* p 236.

96 Katja Mann, Dario Pozzoli, "Robots and Immigration," *Journal of Economic Behavior & Organization*, vol. 227, 2024.

However, while industry and the manufacturing sector can in some cases substitute human labor with robots, this is far less true for the service sector, which nonetheless accounts for over 70% of the GDP in European countries facing demographic decline. The difficulty of automating service-based activities has been thoroughly documented in economic research[97]. Furthermore, even within the industrial sector, small enterprises are generally less likely to adopt robotic technologies[98]. A report from MIT, for instance, revealed that in Japan, only 10% of retirement homes are equipped with robots, and merely 2% of caregivers know how to operate them[99]. Beyond the economic challenges posed by so-called "carebots," their usage remains constrained by cultural and ethical boundaries that are not easily overcome.

Would we entrust our elderly parents or children under the age of three to machines rather than to human caregivers? That may well be the unstated premise of those who advocate for "zero immigration" policies.

Yet this solution is ultimately unviable: **even Japan, historically resistant to labor immigration, has recently begun to open its doors.** In 2024, the number of foreign workers increased by 12.4% (i.e., +225,950 individuals)[100], confirming a steady upward trend in immigrant labor since 2014 (see chart below).

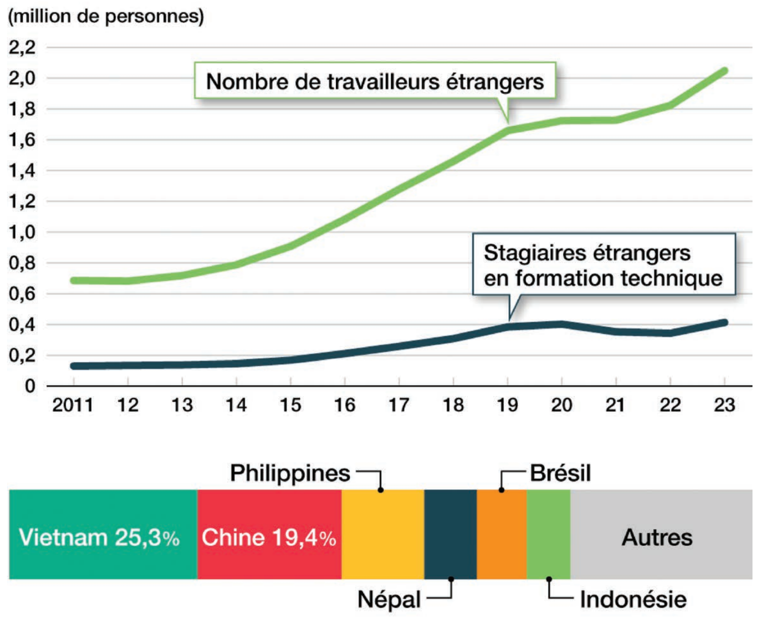
Figure 22 – Evolution of the number of foreign workers in Japan and distribution by nationality

"In this chart, China also includes Hong Kong and Macao."

Reading: "The graph shows that the number of foreign workers (green line) has been rising significantly since the early 2010s."

Tableau: Nippon.com

Source: Ministère de la Santé, du Travail et des Affaires Sociales Japonais



Source : graphique créé par Nippon.com d'après les données du ministère de la Santé, du Travail et des Affaires Sociales. Dans ce graphique, la Chine comprend également Hong Kong et Macao.

nippon.com

97 See notably Daron Acemoglu and Pascual Restrepo, "Tasks, Automation, and the Rise in US Wage Inequality," *National Bureau of Economic Research Working Paper*, No. 28920, June 2021, 108 pp

98 *Ibid.*

99 James Wright, "Inside Japan's Long Experiment in Automating Eldercare," *MIT Technology Review*, January 2023.

100 "Record Number of Foreign Workers in Japan in 2023: Trends in Numbers, Nationalities, and Visa Types," *Japan Data*, Nippon.com.

Let us summarize: Europe's population is aging, and the number of working-age individuals is set to decline sharply in a continent grappling with a sustained drop in birth rates. Governments in the Northern Mediterranean have several policy levers at their disposal to mitigate the effects of this demographic contraction. Increasing labor force participation is necessary, yet insufficient. Family policies may prove effective in certain contexts, but they often lack both predictability and structural impact. Automation—whose limitations are exemplified by the cases of Japan and South Korea—cannot be relied upon as a silver bullet. These three strategies must undoubtedly be pursued together in any credible response to falling fertility rates.

However, a fourth solution—often the subject of heated political debate—must also be implemented: immigration is both an economic and political necessity, despite the narrative pushed by some European political parties that portray it as a threat. In fact, Northern Mediterranean countries are fortunate in one key respect: they are already part of an economically and culturally interconnected region that includes the Southern Mediterranean—where demographic expansion remains robust.

North African countries, in particular, face extremely high rates of youth unemployment. In this context, the demographic pressure in the South is a challenge there—but it may well be the solution in the North. Today, European societies too often rely on a brain drain that weakens Southern countries, while simultaneously drawing on labor migration without strategic foresight or coordination. What is needed now is precisely such strategic coordination: to address depopulation in the North without unilaterally depleting the South of its most highly qualified workers.

III. Immigration: An Essential Economic and Demographic Lever

While no single policy instrument can fully redress the demographic imbalance currently affecting European societies and fuelling labor market pressures, immigration nonetheless emerges as an essential—though not sufficient—lever to meet these challenges.

A. THE GROWING CONTRIBUTION OF IMMIGRANTS TO THE EU LABOR MARKET

1. The Rising Share of Immigrants in the European Union

As of 2024, the European Union was home to 44.7 million residents born outside its borders, accounting for 9.95% of the total EU population[101]. These immigrant populations are predominantly concentrated in the major Western European countries. **Germany stands out with 10.5 million non-EU-born residents (12.6% of its population), followed by France (7.36 million, or 10.8%), Spain (7.25 million, or 14.9%), Italy (5 million, or 8.6%), and the Netherlands (2.14 million, or 11.9%)[102].**

The recent trend is particularly telling: while the EU registered 1.97 million new immigrants in 2020, this figure rose sharply to 5.3 million in 2022 before settling at 4.35 million in 2023. Germany topped the list in 2022 with more than 1.5 million newly arrived non-EU migrants, but was overtaken in 2023 by Spain, which welcomed 1,042,047 newcomers, compared to Germany's 905,273. Italy ranked third with over 370,000 new non-EU immigrants, followed by France with 307,876[103].

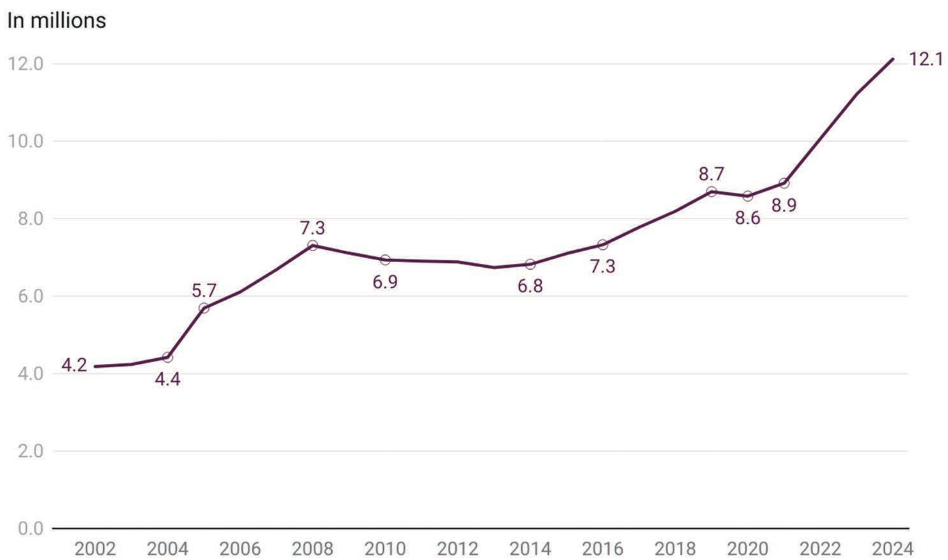
101 Eurostat, *Population on 1 January by age group, sex and country of birth*, March 31, 2025.
102 Ibid.
103 Eurostat, *Employment by sex, age and citizenship (1 000)*, April 14, 2025,

2.
The Sharp Increase in Non-EU Workers Across the Union

The presence of non-EU immigrant workers in the European labor market has steadily grown since the early 2000s. In 2002, these workers represented just 4.2 million of the 171.1 million active individuals aged 20 to 64 in the European Union—amounting to 2.45% of the total labor force. By 2024, their numbers had risen to 12.1 million out of 197.6 million, accounting for over 6% of all employed workers. Notably, following a period of relative stability between 2018 and 2020—during which the number of non-EU workers hovered around 8 million—their numbers have seen a sustained and substantial increase since 2021, growing by an average of one million per year.

Moreover, the growth of the non-EU workforce is occurring at a far faster pace than that of the overall labor force in Europe. **Between 2023 and 2024, the number of non-EU workers increased by 8.1%, while the total active population grew by only 0.91% over the same period[104].** This discrepancy highlights the increasingly vital role that immigrant populations play in shaping the dynamics of the European labor market.

Figure 23 - Number of immigrant workers in the European Union labor market



Reading: In 2024, the number of non-European immigrant workers in the European Union labor market was 12.1 million.

Chart: Action Committee for the Mediterranean

Source : Eurostat

Créé avec Datawrapper

Projections indicate that the share of immigrants within the working-age population will continue to grow at an accelerating pace. According to a previously cited report, the proportion of 15–74-year-olds born abroad is expected to rise from 9% in 2020 to 21.7% by 2060[105].

104 All the data in this paragraph are taken from or reprocessed based on Eurostat, Employment by sex, age and citizenship, 2025.

105 These figures are derived from data in the JRC Tech Report, *Scenarios of labor force participation and employment integration of immigrants in the EU: demographic perspective*, European Commission, 2020, p. 22.

Moreover, non-EU immigrants are particularly concentrated in certain sectors of economic activity. In this regard, a report published by the European Commission on November 5, 2024, notes that in 2022, 11.3% of non-EU immigrants were employed in the accommodation and food services sector, compared to just 4.2% of EU nationals. Similarly, 5.9% of non-EU workers were employed in domestic services, while this sector accounted for only 0.7% of EU workers[106].

These sectors that rely heavily on migrant labor are also among those experiencing the most acute labor shortages. According to a report by the European Labor Authority, servers are in short supply in 17 EU countries, and cooks in 16[107].

3.
Trends Once Limited to Labor Shortage Occupations Are Gradually Becoming Generalised

In the countries most affected by declining birth rates, labor shortages are spreading across multiple sectors, raising the risk of a "Japanisation" of the economy[108] — a dynamic combining rising public debt, population ageing, and stagnant growth — now looming over the European Union as a whole.

In Italy, the working population aged 15 to 39 has declined by an estimated 4.8 million people between 1982 and 2024[109]. Between 2004 and 2024, the number of young workers aged 15 to 34 fell from 8.8 million to 6.1 million — a loss of 2.7 million people. The number of individuals aged 35 to 49 also declined by one million over the same period[110]. **According to the study "*The Labor Market in Italy: Between Records and Mismatches*", published in 2024 by Area Studi Legacoop and Prometeia, Italy will face an annual shortfall of 150,000 workers by 2030[111].**

Today, 40% of companies in the services sector and 9% in the manufacturing sector report that a shortage of workers is a barrier to production. This indicates that labor shortages extend well beyond traditionally affected sectors. With an ageing population, the situation is expected to worsen further by 2050.

106 European Commission, *Statistics on Migration to Europe*, 5 November 2024

107 European Labor Authority, *Labor Shortages and Surpluses 2024*, 2024, p. 112.

108 For an analysis of the economic mechanisms of this «Japanisation», see for instance Patrick Arthus, « Les trois étapes de la « japonisation » au Japon et maintenant dans la zone euro », *Flash Economie, Natixis*, 10 May 2019. We would add to Artus' analysis that beyond the imbalance between capital and labor, the rising costs of ageing further accelerate the growth of public debt.

109 "L'Allarme di Confcommercio: 'Mancano 260Mila Lavoratori nel Terziario", *Confcommercio*, 10 February 2025.

110 Olivier Tosseri, « Les jeunes sont devenus une denrée rare : l'enfer démographique des entreprises italiennes », *Les Echos*, 5 february 2025.

111 Area Studi Legacoop, "*Il mercato del lavoro in Italia, tra record e mismatch*", July 2024.

Similarly, in Germany — also facing low birth rates — the estimated annual need for migrant workers is 400,000. Here too, labor shortages are affecting all sectors, particularly services[112].

In France, the think tank Terra Nova has estimated that to maintain the current demographic support ratio between active and inactive populations, France would need to welcome between 270,000 and 310,000 immigrants each year[113].

Labor shortages are by no means limited to low-skilled occupations. In fact, highly skilled workers are increasingly in demand. On average, 28% of occupations classified as being in shortage across the EU require a university degree[114]. This figure is driven upward by recruitment difficulties for civil engineers and medical specialists — not to mention developers and IT professionals, who are in shortage in 13 EU countries[115].

The rapid expansion of health-related professions is creating strong labor demand, but forecasts suggest that this demand will remain unmet. In 2022, the EU faced a shortfall of 1.2 million doctors, nurses, and midwives[116]. In Germany alone, 11,000 general practitioners are expected to be lacking by 2035[117][118].

B.

MIGRATION PATTERNS AND SETTLEMENT DYNAMICS: TOWARD A RECOMPOSITION OF MIGRATION FLOWS IN EUROPE

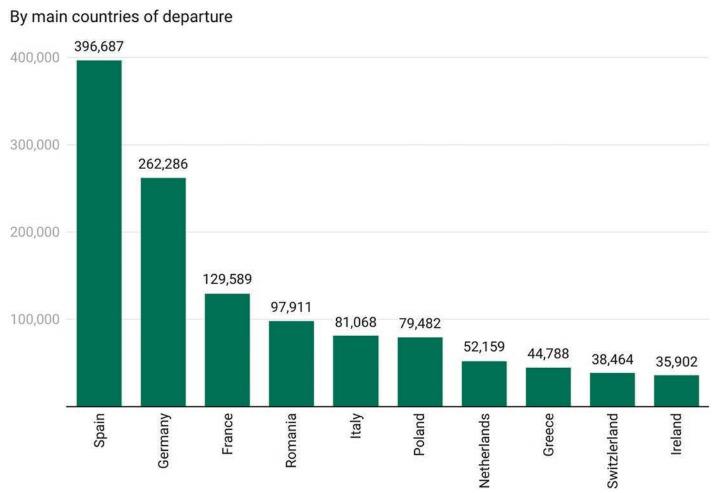
1.

Outbound Migration from the European Union and Intra-European Mobility

Migration patterns within the European Union reflect both a rise in extra-European flows and a continued increase in intra-European movements. In 2023, 1.5 million people left the European Union — a slight increase compared to 1.3 million in 2021 and 1.2 million in 2022. As François Héran has pointed out, this trend illustrates that in a globalized world, all migration flows are increasing — including those departing from the EU[119]. Spain stands out as the main country of emigration, with nearly 400,000 people leaving, followed by Germany (262,000), France (130,000), and Italy (81,000)[120].

At the same time, 1.4 million individuals moved from one Member State to another in 2023 — a figure that has remained relatively stable since 2022. Germany leads intra-EU mobility, with 250,000 nationals relocating within the Union, followed by Spain and Romania. This intra-European circulation now coexists with growing extra-EU immigration, reflecting a gradual reshaping of migration dynamics across the European continent[121].

Figure 24 - Number of individuals who left the European Union in 2023



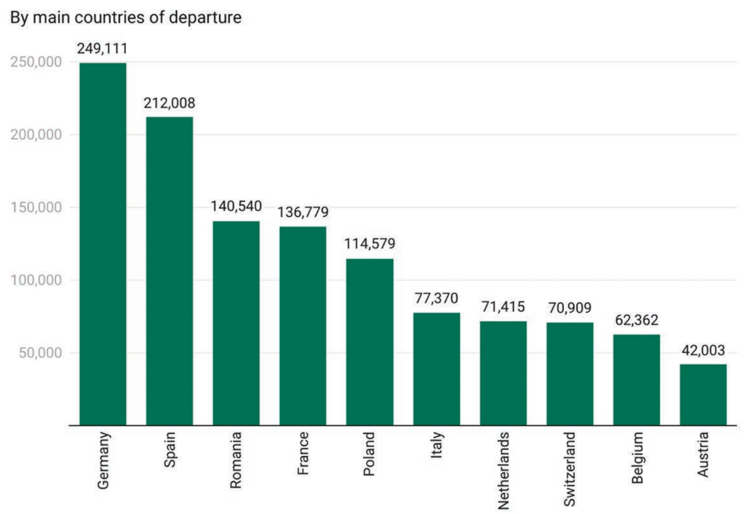
Reading: In 2023, 97,911 Romanians emigrated from the European Union.

Chart: Action Committee for the Mediterranean

Source: Eurostat

Créé avec Datawrapper

Figure 25 - Number of individuals who migrated within the European Union in 2023



Reading: In 2023, 114,579 Polish citizens migrated to another member state of the European Union.

Chart: Action Committee for the Mediterranean

Source: Eurostat

Créé avec Datawrapper

112 Institut für Arbeitsmarkt- und Berufsforschung, "Warum braucht Deutschland 400.000 Migrantinnen und Migranten pro Jahr?", Interview, 2024.

113 Terra Nova, "Les travailleurs immigrés : avec ou sans eux ?",

114 European Labor Authority, *Labor Shortages and Surpluses 2024*, p. 41.

115 The demand for this profession increased by 88% between 2012 and 2021. Source: Employment and Social Developments in Europe, European Commission, Table 2.3, 2023.

116 OCDE, European Commission, *Health at a glance: Europe 2024, State of Health in the EU cycle*, November 2024, p 3.

117 Robert Bosch Stiftung, Press Release: «By 2035, there will be a shortage of approximately 11,000 general practitioners in Germany – Experts recommend the establishment of community health centers».

118 Alessio Dell'Anna, « Sanità: qual è la situazione dei medici nei paesi dell'UE? In Italia, i più anziani », *Euronews*, 23/01/2025.

119 François Héran, *Immigration, le grand déni*, Paris, Seuil, 2023

120 Eurostat, *Emigration by group of country of net usual residence*, 10 April 2025.

121 *Ibid.*

2.

The Different Regions of Origin of Migrants Authorized to Reside in the European Union

The various regions of origin of immigrants in the European Union can be assessed through the number of residence permits granted[122]. In 2023, the EU issued a record 3.821 million first residence permits, representing a 7% increase compared to 2022[123]. Regarding the issuing countries, Germany ranked first with 662,888 residence permits granted in 2023, accounting for 17.3% of all permits issued in the EU that year. It was followed by Poland (642,789 or 16.8%)[124], Spain (548,697 or 14.4%), Italy (389,542 or 10.2%), and France (338,336 or 8.9%)[125].

Among the countries whose nationals benefited most from these permits, Ukraine topped the list with over 300,000 permits issued in 2023. It should be noted, however, that this number is not solely a consequence of the Russian-Ukrainian conflict that began in 2022, as Ukraine also ranked first in 2013. Belarus and India were also among the leading countries of origin in 2023[126].

The countries on the southern shore of the Mediterranean present a more contrasted picture: since 2013, the number of residence permits granted to their nationals by EU countries has increased in absolute terms, but their relative share of the total permits granted has declined. In 2023, Morocco ranked fourth with 180,749 first residence permits issued to its nationals. Since 2013, the kingdom has consistently ranked among the five most represented non-EU nationalities in EU migration statistics. In 2023, Algerian nationals were granted 48,756 residence permits—32,000 of which were in France—placing Algeria 22nd among countries of origin[127]. Yet in 2013, Algeria ranked 11th with a lower total of 32,000 permits. Tunisian nationals were granted 53,716 first residence permits in 2023 (19th), compared to 23,205 in 2013 (14th). Finally, Egyptian nationals received over 54,000 first residence permits in 2023 (18th), compared to 23,205 in 2013 (16th)[128].

122 According to Eurostat, a residence permit refers to any authorization valid for at least three months issued by the authorities of an EU Member State that allows a third-country national to legally reside within its territory. This excludes short-stay visas (less than 90 days) for tourism, business trips, or family and private visits. Moreover, Eurostat only counts permits granted to a person for the first time (i.e., new residence permits). Renewals are therefore not included in these figures. Irregular migrants, estimated at 385,000 in 2023 by Frontex, are likewise excluded from these statistics—although some may later be regularized and obtain a residence permit.

123 Eurostat, *First permits by reason, length of validity and citizenship*, 15 April 2025,

124 The significant increase in permits granted by Poland is largely due to the reception of approximately 1 million Ukrainians following 2022.

125 Ibid.

126 Eurostat, *First permits by reason, length of validity and citizenship,* 15 april 2025.

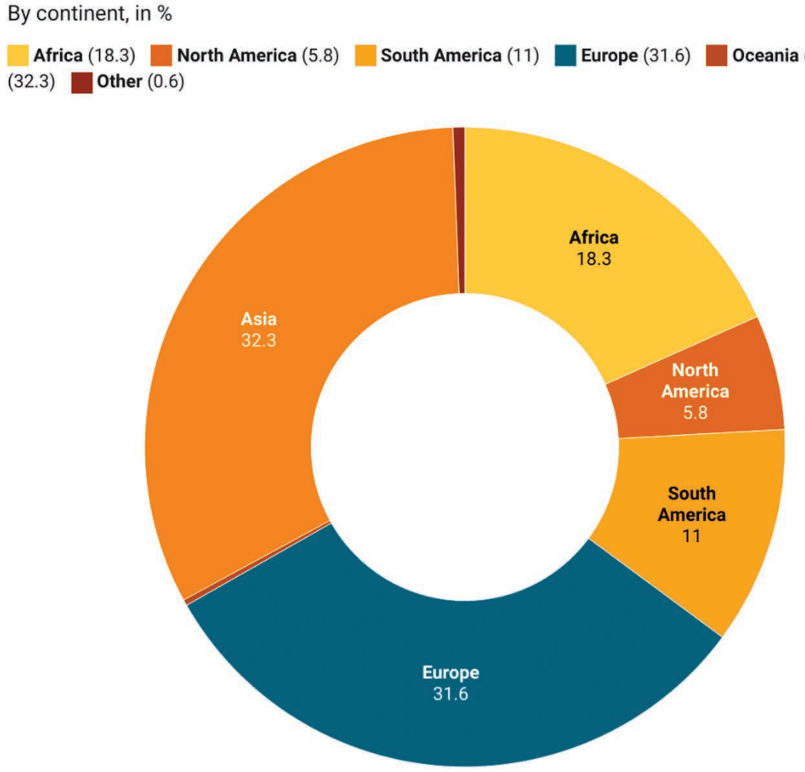
127 French Ministry of the Interior, Directorate-General for Foreign Nationals in France, Les titres de séjour.

128 Eurostat, *Op. Cit.*

Türkiye also remains a major country of origin, with 122,128 permits issued in 2023. Although its ranking has fluctuated over the years—eighth in 2013, ninth in 2017, and sixth in 2023—the volume of residence permits granted to Turkish nationals remains significant.

Country of origin of applicants for residence in the Union	Number of residence permits granted in European Union member states in 2023
Ukraine	308 541
Belarus	281 503
India	212 217
Syria	185 097
Morocco	180 784
Türkiye	127 555
Russia	117 641
China	109 671
Afghanistan	95 944

Figure 26 - Distribution of First Residence Permits Issued in the European Union in 2023



Reading: In 2023, 32.3% of first residence permits were issued to nationals coming from Asia.

Chart: Action Committee for the Mediterranean

Source: Eurostat

Créé avec Datawrapper

Figure 27 - Distribution of First Residence Permits Issued in the European Union in 2023

By region

North America	337 813
West Africa	163 126
Central Africa	44 082
East Africa	74 152
Southern Africa	23 595
North America	114 960
Central America and the Caribbean	88 848
South America	387 091
Western Europe	45 315
Northern Europe	1 910
Eastern Europe	728 155
Balkans, Southeastern Europe	332 440
Oceania	11 973
Middle East	367 862
Central Asia	73 928
South Asia	556 357
Southeast Asia	134 369
Others	22 098

Reading: In 2023, 74,152 first residence permits were issued to nationals from East African countries.

Tableau : Action Committee for the Mediterranean

Source: Eurostat

Créé avec Datawrapper

Sub-Saharan Africa is also a significant source of migration to the European Union. Flows from Nigeria are particularly noteworthy, with 36,342 individuals receiving a first residence permit in 2023. Nigerian nationals primarily settle in the United Kingdom, Italy, Spain, Germany, and France. Senegal and Côte d'Ivoire follow this trend, with rising figures. In 2020, 17,007 Senegalese citizens obtained a first residence permit in the EU; this number rose to 30,073 in 2023. Over the same period, figures for Côte d'Ivoire doubled, increasing from 12,415 permits issued in 2020 to 23,511 in 2023.

While the proportion of immigrants from the Maghreb among those arriving in the European Union is gradually declining, their absolute numbers have significantly increased since 2013—an indication of growing regional integration across the Mediterranean.

IV. Case Study: North African Immigration to Europe – A Dynamic of Integration

Special attention must be paid to North African countries, as migration flows between the two shores of the Mediterranean—particularly between Algeria, Morocco, Tunisia and, on the European side, France, Spain, and Italy—form one of the main migratory corridors. This dynamic is largely explained by historical ties, especially colonial ones, between these regions[129]. The Mediterranean region has long been deeply integrated in terms of migration, at least since the early 20th century. World War I, described as a "fundamental rupture" by historian Gérard Noiriel, marked in France the birth of "selective immigration"[130]. At that time, 220,000 men from across the colonial empire were brought to France as early as 1914, including around 75,000 Algerians, 35,000 Moroccans, and 18,500 Tunisians[131].

Since the Mediterranean already displays a high degree of integration—particularly in migratory terms—it is essential to gain a better understanding of migrants' regions of origin, their profiles, and their economic integration into host countries. These flows actively contribute to the vitality of Northern Mediterranean economies.

A. DEMOGRAPHIC CONTEXT IN MIGRANT-SENDING COUNTRIES ON THE SOUTHERN SHORE OF THE MEDITERRANEAN

1. Growing Demographic Disparities among North African Countries

North African countries are experiencing demographic trends marked by increasingly divergent dynamics. While Morocco and Tunisia are

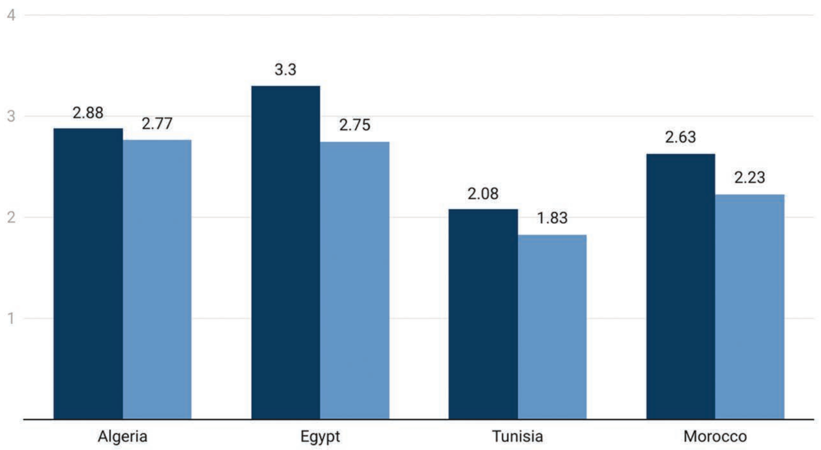
129 International Organization for Migration, *World Migration Report*, 2020, p 477.

130 Gérard Noiriel, *Immigration, antisémitisme et racisme en France (XIXe-XXe siècle) : discours publics, humiliations privées*, 2007.

131 Laurent Dornel, « L'appel à la main-d'œuvre étrangère et coloniale pendant la Grande Guerre : un tournant dans l'histoire de l'immigration ? », *Migrations Société*, vol. 156, no. 6, 2014, pp. 51-68.

nearing the completion of their demographic transition, Algeria and Egypt continue to exhibit high demographic indicators, resulting in sustained population growth. In 2023, Tunisia's natural population increase stood at 94,000 and Morocco's at 417,000, while Algeria and especially Egypt recorded much higher figures, with 692,000 and 1,780,000 respectively. This phenomenon is largely explained by persistently high fertility rates: Algeria and Egypt had fertility rates of 2.77 and 2.75 children per woman, whereas Morocco and Tunisia reported lower rates of 2.23 and 1.83 respectively in 2023. Compared to 2010, these rates have declined; however, they remain relatively high, particularly in Algeria and Egypt, where fertility still exceeds the replacement level of two children per woman.

Figure 28 - Fertility rates in North African countries



Reading : In 2023, the fertility rate of Tunisian women was 1.83.

Chart: Action Committee for the Mediterranean

Source: UN Population Division

Créé avec Datawrapper

2.

The Population of the Southern Mediterranean Shore: A Young and Growing Population, with an Increasing Number of Graduates but Limited Job Opportunities

Given their rapidly growing populations, Egypt and Algeria are expected to become major labor reservoirs in the coming years, both to meet their own domestic labor market demands and to address the needs of the European Union.

By 2050, demographic growth in North Africa is projected to be particularly pronounced in these two countries. **According to median projections[132], Egypt's population is expected to grow by 36%, rising from 118.4 million in 2025 to 161.6 million in 2050. This growth is driven by a fertility rate that, although declining, remains above the generational replacement threshold, as well as by a still-high natural increase. Algeria will follow a similar trend, with a 31% increase in population, reaching 59.6 million in 2050, compared to 45.4 million in 2025.**

132 United Nations, *World Populations prospects*, 2024.

Even in a zero-migration scenario, demographic projections[133] for Egypt and Algeria remain broadly similar. In Egypt, the population without migration is estimated at 117.4 million in 2025, just one million less than the median scenario, before converging to nearly the same estimate by 2050. In Algeria, the difference is slightly greater: the population without migration would reach 47.2 million in 2025 (about 2 million fewer) but would exceed the median projection by 2050 with 60.4 million inhabitants.

Egypt and Algeria also stand out for their very young populations and a relatively small proportion of elderly people, ensuring a large current and future working-age population—unlike the trends observed in Europe. In Egypt, the old-age dependency ratio (the share of people over 65 compared to those aged 15 to 64) is estimated at 8.3% in 2025 (meaning 12 people of working age per person over 65) and is projected to reach only 14.8% by 2050 (still 7.14 working-age individuals per elderly person).

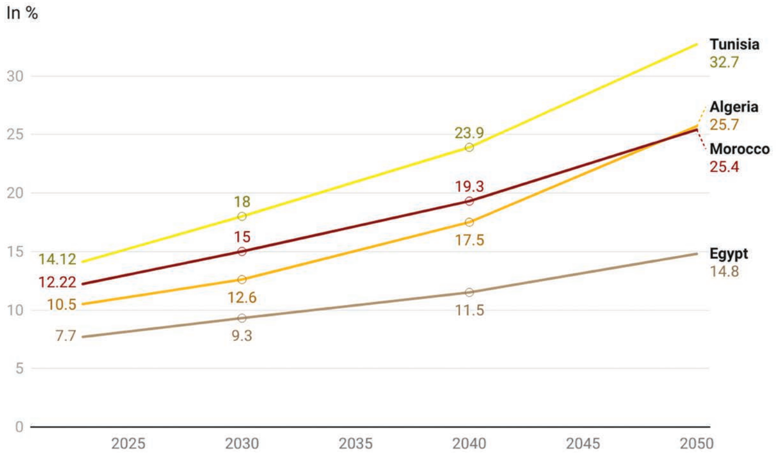
In Algeria, the dependency ratio remains low, though higher than Egypt's: it stands at 10.8% in 2025 (9.25 working-age individuals per person over 65) and is expected to rise to 25.7% by 2050 (just under four working-age individuals per elderly person). These levels remain far more favourable than in the European Union, where the average was estimated at 35.2% in 2025 and is projected to reach 52% in 2050—equivalent to only two people of working age for every person over 65[134].

Tunisia, on the other hand, has a more ageing population structure compared to the other North African countries. Its dependency ratio currently stands at 14.9%—already equivalent to Egypt's projected level for 2050—and is expected to increase to 32.7% by mid-century. Morocco follows a similar trajectory, with a ratio of 12.7% in 2025 and 32.7% in 2050. These developments suggest that while Egypt and Algeria will continue to benefit from abundant labor in the decades ahead, Tunisia and Morocco will gradually face the challenges of an ageing population, including increasing demands for economic and social support for the elderly. In short, Morocco and Tunisia are expected to face, within thirty years, the demographic situation Europe is already anticipating today.

133 *Ibid*.

134 Eurostat, *Old-age dependency ratio, first variant (population aged 65 and over as a share of the population aged 15 to 64)*, 2023.

Figure 29 - Median Projection of the Old-Age Dependency Ratio (Population ages over 65 and over to Population aged 15 to 64)



In 2050, in Egypt, the proportion of people aged 65 and over compared to those aged 15 to 64 will be 14.8%. This means there will be approximately 15 people aged 65 or older for every 100 working-age individuals (15 to 64 years old). In Morocco and Algeria, there will be about 25 people aged 65 or older for every 100 working-age individuals (15 to 64 years old).

Chart: Action Committee for the Mediterranean

Source: United Nations

Créé avec Datawrapper

In addition to being very young, the population of the Southern Mediterranean countries is increasingly educated: the number of students is growing even faster than the general population. In Algeria, the number of university students rose from approximately 1.2 million in 2013[135] to 1.8 million in 2024 (a 50% increase)[136]; in Morocco, it increased from 790,000 in 2014 to 1.3 million in 2024 (a 65% increase); and in Egypt, the number of students rose from 1.9 million in 2014 to 2.3 million in 2024 (a 20% increase). Universities in the Southern Mediterranean are experiencing particularly strong growth in enrolment in fields facing labor shortages both in the South and the North. In Morocco, for example, engineering, medicine and technology fields all saw a notable increase in student enrolments for the 2023–2024 academic year compared to the previous year: +9.16% in engineering, +38.77% in medicine, and +7.56% in technology[137].

Yet in the Maghreb, unemployment among graduates remains high. In Morocco, the unemployment rate is significantly higher among youth aged 15 to 24 (35.8%) and among graduates (19.7%) than in the general population (13%)[138]. The same is true in Egypt, according to data from the last quarter of 2024: while the overall unemployment rate stands at just 6.7%, it surges to 33.6% for recent graduates aged 20 to 24, up from 30.5% in the second quarter of 2024[139]. Although the unemployment rate for youth aged 25 to 29 has decreased—from 26.3% in 2023 to 21.7% at the end of 2024—it still remains very high. In Tunisia, 25% of young graduates were unemployed in 2024[140].

135 Ministère des Affaires étrangères et du développement international Ambassade de France en Algérie, Fiche Curie Algérie.

136 « La rentrée universitaire 2024-2025 par les chiffres », *Horizons*, September 24, 2024.

137 Ministère de l'enseignement supérieur, de la recherche scientifique et de l'innovation du Maroc, *L'enseignement supérieur en chiffres 2023-2024*, p 16.

138 Haut-commissariat au plan du Maroc, *Note d'information du Haut-commissariat au plan relative à la situation du marché du travail en 2023.*

139 Chiffres de l'Agence pour la mobilisation publique et pour les statistiques, novembre 2024. Voir aussi « 6,7% de la population active égyptienne touchés par le chômage au troisième trimestre 2024 », *Ahram Info*, November 14, 2024.

140 Institut National de Statistiques de Tunisie, *Indicateurs de l'emploi et du chômage au troisième trimestre 2024, 2024*, p 5

The difficulty faced by young graduates in entering the labor market often leads them to emigrate, triggering severe brain drain phenomena across the South. In Tunisia, 39,000 engineers have left the country out of a total of 90,000 registered with the national Order of Engineers[141]. Kamel Sahnoun, Dean of the Tunisian Order of Engineers, even estimates that on average, 20 engineers leave the country every day—despite the annual cost of engineering education in Tunisia being approximately 650 million dinars. Moreover, 71% of graduates are actively seeking immigration opportunities[142]. According to the World Bank, this exodus of skilled professionals is one of the main causes of economic stagnation in the Maghreb countries[143].

3.

North Africa: Not Only a Region of Emigration, but Also One of Immigration and Transit

North African countries are not merely places of emigration; they are also destinations for immigration and serve as transit hubs for numerous migrants seeking to reach other regions. However, the proportion of immigrants in these countries remains relatively low in comparison to their total populations. In 2024, Morocco hosted 111,069 immigrants, representing 0.3% of its population, while Tunisia recorded 63,201 immigrants, equivalent to 0.5% of its population[144].

A significant share of these immigrants consists of students from West Africa. In 2019, foreign students in Morocco mainly originated from Mali, Côte d'Ivoire, Guinea, Gabon, and Senegal—highlighting the country's central role as a higher education destination on the African continent, with 20,140 foreign students enrolled in 2018[145]. Tunisia, though hosting fewer international students (6,035 in 2018), attracted individuals primarily from Cameroon, Libya, the Democratic Republic of Congo, Mauritania, and Mali[146].

Beyond student mobility, the composition of migratory flows differs between the two countries. Morocco receives a larger number of European and North American migrants (55,200 in 2024), whereas Tunisia primarily attracts African immigrants (33,803), particularly from North Africa[147].

141 « Exode des ingénieurs : la Tunisie perd une génération de talents », *La Presse de Tunisie*, March 10, 2025.

142 Institut tunisien des études stratégiques, *Op. cit.* p. 13.

143 World Bank, *World Development Report 2021: Data for Better Lives*, 2021.

144 ETF, *Fiche pays Migration et compétences Maroc*, Septembre 2021.

145 *Ibid.*

146 ETF, *Fiche pays Migration et compétences Tunisie*, Septembre 2021.

147 United Nations Department of Economic and Social Affairs, Population Division (2024). *International Migrants Stock* 2024.

Egypt is the North African country hosting the largest number of immigrants, representing nearly 1% of its population—that is, 1,139,820 individuals. These immigrants come mostly from the African continent, but also from Palestine, with 90,000 Palestinians residing in Egypt. In Algeria, immigration is also marked by a significant presence of nationals from North Africa, especially from Western Sahara, accounting for 168,862 immigrants in the country[148].

Nombre d'immigrés en Tunisie par régions et pays d'origines en 2024

Afrique	Asie	Europe, Amérique du Nord	Monde = TOTAL
33 803 *Dont :* **Afrique du Nord : 29 527** - Algérie: 11 622 - Libye: 10 180 - Maroc : 6 458 - Egypte : 1 267 **Afrique de l'Ouest : 3 479** - Mali : 1 112 - Côte d'Ivoire : 720 - Nigeria : 604 - Mauritanie : 588 - Sénégal : 455 **Afrique centrale : 797** - Cameroun : 797	**2 780** *Dont :* **Asie de l'Ouest (= MO) : 2780** - Syrie : 1 452 - Palestine : 619 - Irak : 709	**14 372** *Dont :* **Europe : 13 695** **- Europe de l' Ouest : 11 231** - France : 9 616 - Allemagne: 1 615 **- Europe du Sud : 2 464** - Italie: 2 464 **Am. Du Nord : 677** - USA : 677	**63 201** *Dont :* **Autres : 12 246**

Nombre d'immigrés au Maroc par régions et pays d'origines en 2024

Afrique	Asie	Europe, Amérique du Nord	Monde = TOTAL
29 629 *Dont :* **Af. du Nord : 22 301** - Algérie: 15 731 - Tunisie: 3 018 - Egypte : 2 176 - Libye: 1376 **Afrique de l'Ouest : 5 127** - Sénégal : 2 113 - Guinée : 1 151 - Mauritanie : 1 863 **Afrique centrale : 2 201** - Congo : 2 201	**7 574** *Dont :* **Asie de l'Ouest (= MO) : 7 574** - Syrie : 3 989 - Irak : 2 006 - Liban : 1 579	**55 200** *Dont :* **Europe : 53 061** **Europe de l' Ouest : 44 627** - France : 41 301 - Allemagne: 1 685 - Belgique : 1 641 **Europe du Sud : 7 016** - Italie: 2 219 - Espagne : 4 797 **Amérique Du Nord : 2 139** - USA : 2 139	**111 069** *Dont :* **Autres : 18 666**

Nombre d'immigrés en Algérie par régions et pays d'origines en 2024

Afrique	Asie	Europe, Amérique du Nord	Monde = TOTAL
184 622 *Dont :* **Afrique Du Nord : 172 849** - Sahara occidental : 168 862 - Libye 2 364 - Soudan : 1623 **Afrique de l'est : 11 773** - Somalie: 11 773	**61 480** *Dont :* **Asie de l'Ouest (= MO) : 59 123** - Palestine : 32 225 - Syrie : 8 038 - Irak : 7 711 - Arabie Saoudite : 3 992 - Yémen : 2 404 - Jordanie : 2 216 - Liban : 1242 - Koweït : 1 215 **Asie du sud-est : 2 357** - Indonésie : 1467 - Malaisie : 890	**4 837** *Dont :* **Europe : 3 726** - Europe de l'Ouest : 1352 - Europe de l' Est : 813 - Europe du Nord : 810 - Europe du Sud : 751 **Amérique Du Nord : 1 111** - USA : 1 111	**259 458** *Dont :* **Autres : 8 519**

148 *Ibid.*

Nombre d'immigrés en Egypte par régions et pays d'origines en 2024

Afrique	Asie	Europe, Amérique du Nord	Monde = TOTAL
648 843 *Dont :* **Afrique Du Nord : 504 515** - Soudan: 500 000 - Libye 2 564 - Maroc : 979 - Tunisie: 507 - Algérie : 465 **Afrique de l'Est : 140 769** - Erythrée: 32 390 - Ethiopie : 17 747 - Somalie: 50 036 - Sud Soudan : 37 915 **Afrique de l'ouest: 2 475** Nigeria, Niger, SL, Côte d'ivoire, Guinée Senégal **Afrique centrale : 780** Cameroun, Tchad, Congo	**340 768** *Dont :* **Asie de l'Ouest (= MO) : 294 157** - Irak: 20 517 - Palestine: 89 239 - Syrie: 156 46 - Yémen : 10 716 - Israël : 7 095 - Arabie Saoudite: 3490 - Jordanie: 2 616 - Liban : 1572 - Koweït: 1064 **Asie de l'Est : 35 816** - Chine : 34 659 - Corée : 2575 **Asie du sud est : 8220:** - Indonésie : 3074 - Malaisie: 2311	**75 669** *Dont :* **Europe : 72 467** - Europe de l'Ouest : 18 639 - Europe de l' Est : 30 616 - Europe du Nord : 17 877 - Europe du Sud : 5335 **Amérique Du Nord : 3202** - USA : 2 512 - Canada : 690 **Océanie : 1077** - Australie : 1077	**1 139 820** *Dont :* **Autres : 73 257**

B.

CHARACTERISTICS OF MIGRATION FLOWS FROM NORTH AFRICA TO THE EUROPEAN UNION

1.

The European Union: A Primary Destination for Migrants from North Africa

The European Union remains the main destination for migrants originating from North Africa, with France, Italy, and Spain being the most prominent host countries. Approximately 90% of Tunisian and Moroccan migrants reside in Europe. Tunisians are primarily settled in France (62.5%) and Italy (16.5%), while Moroccans are mainly distributed across Spain (30%), France (29.4%), and Italy (13%). As for Algerian migrants, France stands out as their overwhelming destination, hosting 79% of them, followed by Canada (5.4%) and Spain (4.7%)[149].

In contrast to migrants from other North African countries, Egyptian migrants predominantly relocate to the Middle East, which hosts 84% of them. This trend is largely driven by geographic proximity and economic opportunities. Alaa El-Aswany's novel The Yacoubian Building (2002) notably illustrates this orientation, depicting a variety of characters from diverse social backgrounds who have left or are planning to leave for the Gulf countries. As of 2024, 65% of Egyptian migrants resided in the Gulf region. Saudi Arabia ranks first, hosting 31% of Egyptian migrants, followed by the United Arab Emirates (17.4%), Kuwait (9.3%), and Bahrain. Jordan also receives a significant share, accounting for 15.9%. Outside the Middle East, the United States represents a notable destination, hosting 5.5% of Egyptian migrants[150].

149 United Nations Department of Economic and Social Affairs, Population Division (2024). *International Migrants Stock* 2024.

150 *Ibid.*

In 2024, only 6.3% of Egyptian migrants were residing in Europe, despite demographic projections suggesting that Egypt's population dynamics could, in the long term, contribute to mitigating the effects of demographic ageing within the European Union.

The preference of Egyptian workers for Gulf countries may gradually diminish due to the combined effects of labor nationalization policies adopted by these states and persistent discriminatory practices towards Egyptian nationals[151]. Nevertheless, the proportion of Egyptians present in the Gulf region has so far remained relatively stable.

2.

The Profile of North African Migrants at the Time of Emigration

The profile of North African migrants is diverse; however, their departure is often primarily driven by the pursuit of better employment prospects. High unemployment rates—particularly among young people and university graduates—constitute a major push factor behind their migration.

a) The Profile of Moroccan Migrants

One third of Moroccan migrants hold a higher education degree at the time of departure, while a similar proportion has completed secondary education. A segment of this population migrates specifically to pursue advanced studies abroad. Between 2000 and 2018, the proportion of Moroccan students undertaking tertiary education abroad declined from 13.6% to 5%. Nonetheless, in absolute terms, their number increased from 40,077 to 52,500 over the same period[152]. This mobility is primarily motivated by the search for better prospects, especially in terms of employment opportunities.

Indeed, the unemployment rate among university graduates (19.7%) is significantly higher than that of the general population (13%)[153]. This dynamic poses a major challenge for Morocco, which is witnessing a growing emigration of its most qualified talents to other countries. For instance, in the healthcare sector, it is estimated that approximately 30% of graduates from faculties of medicine and pharmacy have left the country[154]. This brain drain further exacerbates an already critical shortage of medical professionals, with an estimated deficit of 47,000 doctors in 2023, a figure projected to rise to 53,000 by 2035[155].

151 Sania Mahyou, « Nous ne sommes plus les bienvenus : dans les pays du Golfe, l'avenir incertain des immigrés égyptiens », *Middle East Eye*, 17 January 2023.

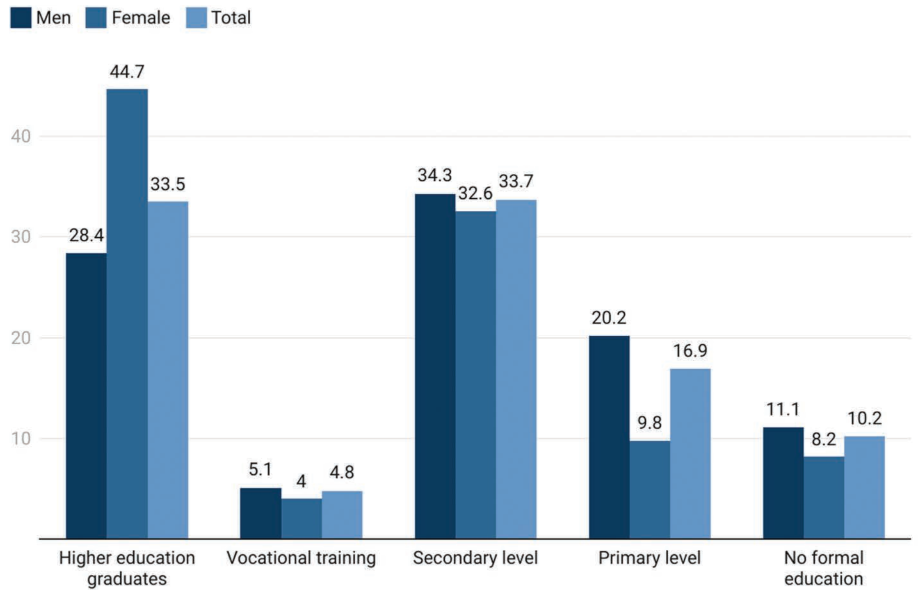
152 ETF, *Migration et compétences : Le cas du Maroc,* 2021, p 26.

153 Haut-commissariat au plan du Maroc, *Note d'information du Haut-commissariat au plan relative à la situation du marché du travail en 2023.*

154 Alexandre Aublanc, « Le Maroc confronté à une pénurie de médecins », *Le Monde*, 15 February 2024.

155 Cour des comptes, *Rapport annuel 2021,* 2023, p 212.

Figure 30 - Education Level of Moroccan Migrants in 2020



Reading: En 2020, 33.5% des migrants marocains étaient diplômés du supérieur.

Chart: Action Committee for the Mediterranean

Source: Haut Commissariat au Plan du Maroc

Créé avec Datawrapper

b) The Profile of Tunisian Migrants

More than one third of Tunisian migrants hold a higher education degree. Among female Tunisian migrants, this proportion is even higher, with 43.1% holding tertiary qualifications. Additionally, 38.7% have completed secondary education[156]. The high unemployment rate among young graduates—reaching 25% in the third quarter of 2024—is one of the principal drivers of youth emigration from Tunisia[157].

This situation contributes significantly to the brain drain, particularly among engineers: it is estimated that 39,000 out of the 90,000 individuals registered with the Tunisian Order of Engineers have left the country[158]. More broadly, among highly skilled professionals, the emigration rate increased from 17.3% prior to the year 2000 to 47.3% after 2010[159].

In response to this trend, the Tunisian government has proposed measures to promote circular migration—namely, mechanisms aimed at facilitating the return of qualified nationals who have emigrated abroad[160].

156 INS, *Indicateurs de l'emploi et du chômage au troisième trimestre 2024,* 2024, p 5.

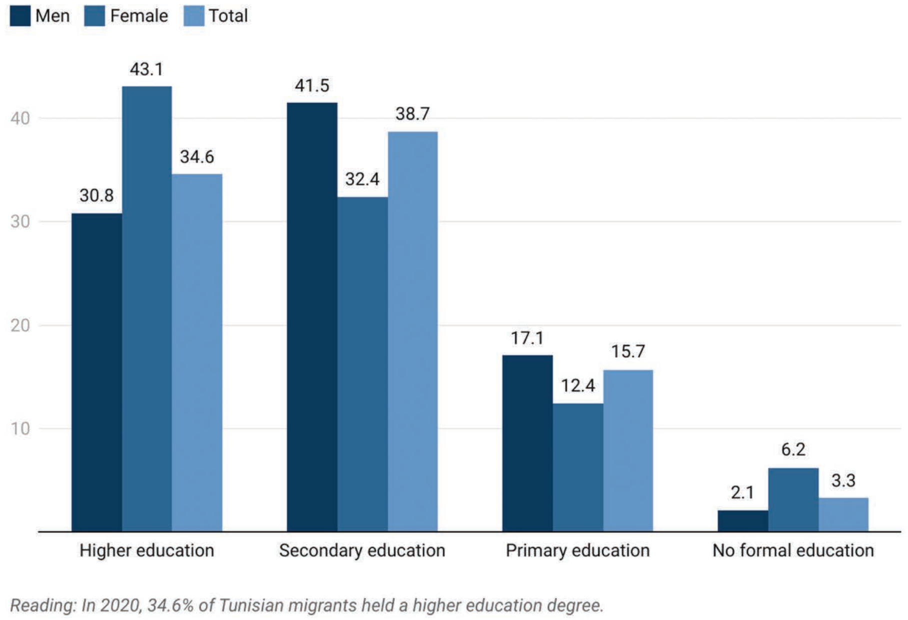
157 Institut Tunisien des Études Stratégiques, *La fuite des cerveaux parmi les ingénieurs en Tunisie : causes, conséquences et propositions de politiques économiques,* juin 2024, p 22.

158 Tunisian Institute for Strategic Studies, *Brain Drain Among Engineers in Tunisia: Causes, Consequences, and Proposals for Economic Policies,* June 2024, p. 22.

159 *Ibid.*

160 Institut Tunisien des Études Stratégiques, *La migration des professionnels de santé, résumé analytique,* mars 2024.

Figure 31 - Education level of Tunisian migrants in 2020



Reading: En 2020, 34.6% des migrants tunisiens étaient diplômés du supérieur.

Chart: Action Committee for the Mediterranean

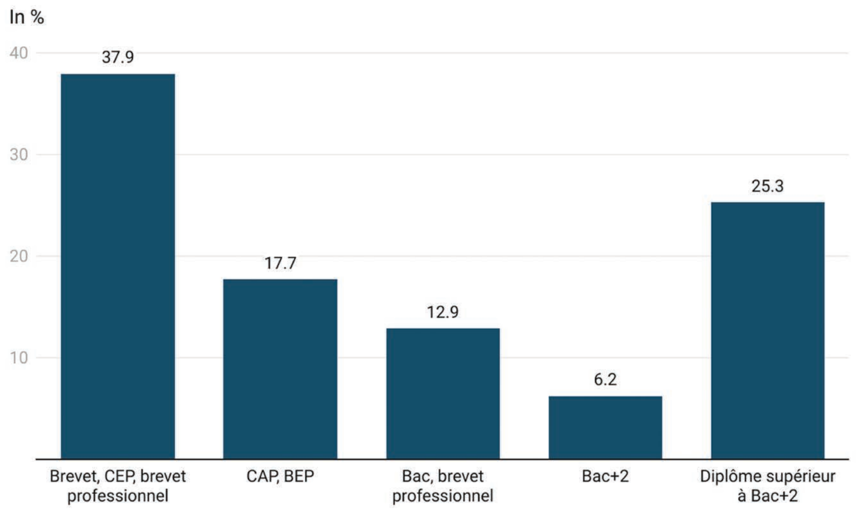
Source: Institut National des Statistiques Tunisie

Créé avec Datawrapper

c) The Profile of Algerian Migrants

Data on Algerian migrants are primarily produced by France, which in 2024 hosted 79% of Algerian migrants residing in the European Union—amounting to 1,405,235 individuals[161]. Compared to Moroccan or Tunisian migrants, Algerian migrants tend to have slightly lower levels of formal qualification: 37.9% of them hold no diploma, certificate, or primary school certificate, while 25.3% possess a higher education degree[162].

Figure 32 - Education level of Algerian immigrants in France in 2023



Reading: In 2023, 25.3% of Algerian immigrants held a diploma higher than a two-year post-secondary degree (Bac +2).

Chart: Action Committee for the Mediterranean

Source: Insee

Créé avec Datawrapper

161 United Nations Department of Economic and Social Affairs, Population Division (2024). *International Migrants Stock* 2024.

162 Insee, *Niveau de diplôme des immigrés et des descendants d'immigrés par origine géographique*, 2023.

C.

THE ECONOMIC INTEGRATION OF MIGRANTS IN THE NORTHERN MEDITERRANEAN COUNTRIES

1.

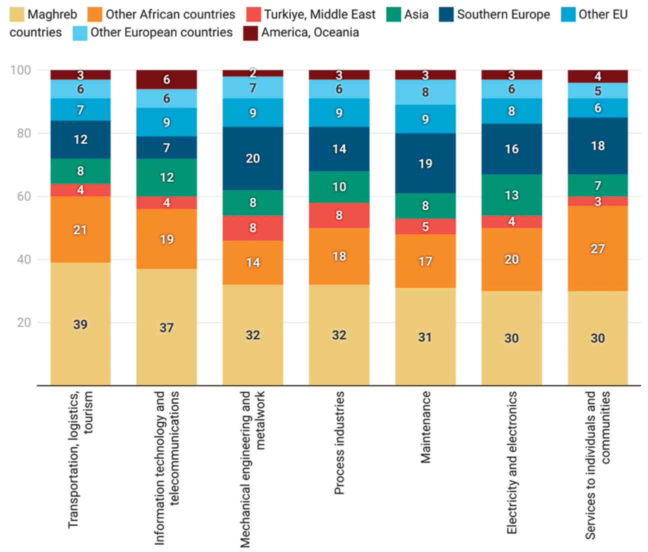
The Economic Integration of Migrants in France

Migrants arriving in France are generally young. In 2019, the median age of the 272,000 newly arrived migrants was 26 years, with a balanced gender distribution—women accounted for 52% of this population. Among the 57,000 migrants originating from the Maghreb, the median age was slightly higher at 28, and women represented 54% of the group.

As of 2023, among Maghreb-origin migrants settled in France, 38.8% held no diploma beyond the brevet or primary education certificate, while 24.1% had attained a bac+2 (two years of post-secondary education), a figure slightly below that of the general population (27.1%)[163].

In terms of employment, migrants accounted for 11.6% of the economically active population aged 15 to 64 in France (excluding Mayotte) in 2021[164]. North African workers make up a significant portion of the employed immigrant workforce in France. In 2019, they represented 39% of immigrant workers in the transport, logistics, and tourism sectors. In the fields of information technology and telecommunications, they accounted for 37%, while in mechanical and metalworking industries, they constituted 32% of the workforce.

Figure 33 - Representation of immigrant workers in France by professional sector



Reading: In 2019, in France, 37% of immigrant workers employed in the information technology and telecommunications sector were originally from the Maghreb.

Chart: Action Committee for the Mediterranean

Source: Ilnsee

Créé avec Datawrapper

163 *Ibid.*

164 DARES, *Quelles situations sur le marché du travail des immigrés et des descendants d'immigrés en 2021 ?*, 2023, p 8.

Migrants originating from the Maghreb also hold highly qualified professions and contribute to addressing labor shortages in sectors under pressure in the Northern Mediterranean countries, notably in healthcare.

As of January 1, 2025, 13.6% of all practicing physicians in France were trained abroad[165]—this number has increased by 113.9% compared to 2010, when the number of active physicians with foreign qualifications stood at 15,349. Moreover, 8% of physicians practicing in France obtained their diplomas outside the European Union, amounting to approximately 19,300 doctors.

Physicians practicing in France with foreign diplomas obtained outside the EU mainly originate from Algeria (36.2%, approximately 7,000 doctors), Tunisia (14.3%, approximately 2,760 doctors), and Syria (8.2%, approximately 1,580 doctors); Morocco accounts for 6.9% of foreign-trained physicians practicing in France (approximately 1,340 doctors). Thus, physicians trained in Algeria, Tunisia, and Morocco represent more than 11,000 doctors practicing in France—over 4.5% of the total medical workforce in the country. These doctors are particularly concentrated in departments located in and around the Île-de-France region[166].

Foreign-trained physicians tend to be specialists: while 3.8% of general practitioners practicing in France in 2025 obtained their diplomas outside the EU, this proportion rises to 10.9% for surgical specialists and 11.1% for medical specialists[167].

This data highlights that migrants from the Maghreb also occupy highly qualified positions within a healthcare sector experiencing significant shortages. According to the France Travail survey of April 2025, 74.9% of physician recruitment projects are reported as difficult to fulfill[168].

165 Conseil national de l'Ordre des Médecins, *Atlas de la démographique médical en France*, 2025, p 67.

166 Calculations based on *Op. Cit.*, p. 168.

167 *Ibid*. p. 73.

168 Enquête France Travail, *Besoins en main d'œuvre 2025*, p 8 et 26.

Figure 34 - Distribution of practicing physicians with non-EU degrees by speciality

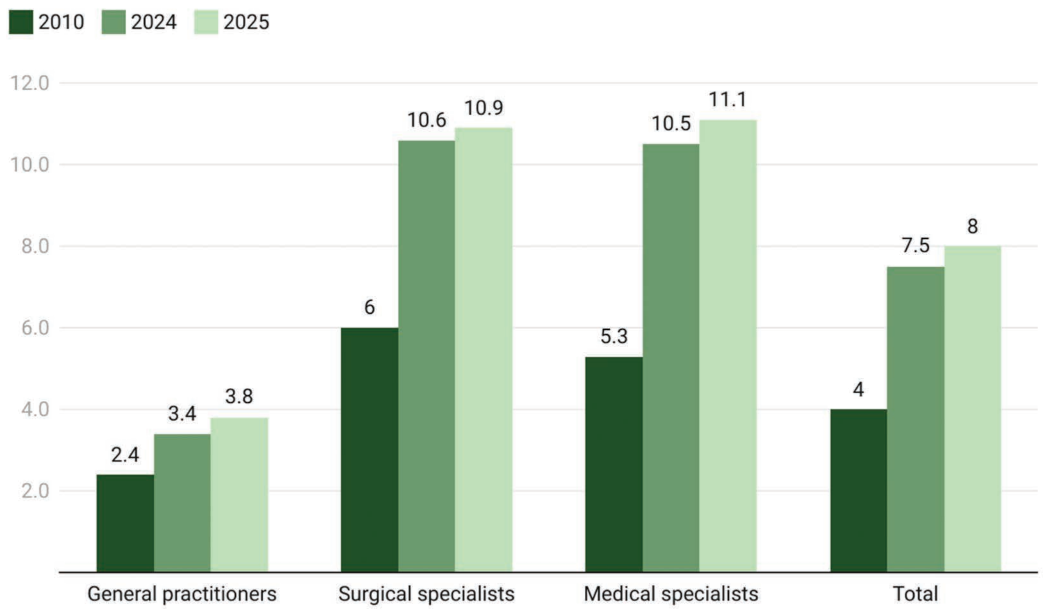
As a percentage of the total professionals

Reading: In 2025, 10.9% of surgical specialist doctors hold a diploma obtained outside the EU.

Chart: Action Committee for the Mediterranean

Source: INSEE

Créé avec Datawrapper



In response to labor shortages, the law of January 26, 2024, titled "to control immigration and improve integration,"[169] established a temporary residence permit called "work in shortage occupations". This permit is available to individuals who have resided in France for at least three years and can demonstrate at least 12 months of employment within the last 24 months. This permit may be upgraded to a multi-year residence card, depending on the employment contract of the immigrant. Furthermore, a specific four-year residence permit, "Talent – Medical and Pharmacy Professions," has been introduced for healthcare professionals trained outside the European Union to address the sector's needs.

Concurrently, the law facilitates expulsions, particularly for foreigners convicted of certain offenses, such as aggravated theft. It also allows for the refusal or revocation of residence permits in cases of non-compliance with the principles of the Republic or when the individual poses a serious threat to public order. This approach aims to promote labor immigration while restricting other migratory flows.

169 Loi n°2024-42 du 26 janvier 2024 pour contrôler l'immigration, améliorer l'intégration, *Légifrance*.

2.

Integration of Immigrants into the Economic Life of Italy

The government of Giorgia Meloni has recently tightened immigration conditions through the Cutro I and Cutro II decrees, adopted in 2023. The first decree, enacted in May 2023, notably restricts the "special protection" residence status (introduced in 2020), facilitates expulsions by establishing "repatriation detention centers" in all 20 regions of the country, and extends the maximum detention period for migrants from 120 to 135 days. It also limits the number of arrivals and narrows the list of eligible countries for immigration. For non-seasonal employment, candidates must come from a restrictive list of 33 countries including Japan, South Korea, and Serbia; notably, countries currently major sources of migration to Italy such as Syria and Afghanistan are excluded[170].

Despite this hardening stance and a resolutely anti-immigration posture, the Italian government remains open to labor migration. **The 2023 Decreto Flussi** foresees the admission of 452,000 foreign workers between 2023 and 2025. This apparent contradiction has not cost Giorgia Meloni any popularity points, demonstrating that anti-immigration rhetoric does not extend to labor migration in a country severely affected by declining birth rates.

The main immigrant communities in Italy come from Ukraine, Albania, Romania, Bangladesh, Morocco, Pakistan, and Egypt. **Among North African countries, arrivals from Egypt and Tunisia have notably increased, indicating an expanding migratory dynamic for these nationalities[171].**

In 2023, Italy hosted 399,146 Moroccans, representing 10.7% of the country's non-European foreign population. This community experienced a significant increase in arrivals, with 19,600 new entrants in 2023—29% more than in 2021. Moroccan-origin workers in Italy are distributed across various sectors: 26.1% in industry, 20% in transport and business services, 15.2% in commerce, and 12.3% in construction. **Agriculture also employs a notable share, with Moroccans accounting for 15.4% of agricultural laborers.** Entrepreneurship plays a key role, as 15.3% of Moroccans are self-employed, predominantly in commerce and transport, which together constitute 67% of Moroccan-owned individual enterprises. The Moroccan community is relatively young, with an average age of 34.7 years[172].

170 Présidence du Conseil des ministres, Décret-Loi 10 mars 2023, n°20, 20 of March 10, 2023.

171 ISTAT. Statistical Report, *Internal and international migrations of the resident population*, years 2022-2023, 2024.

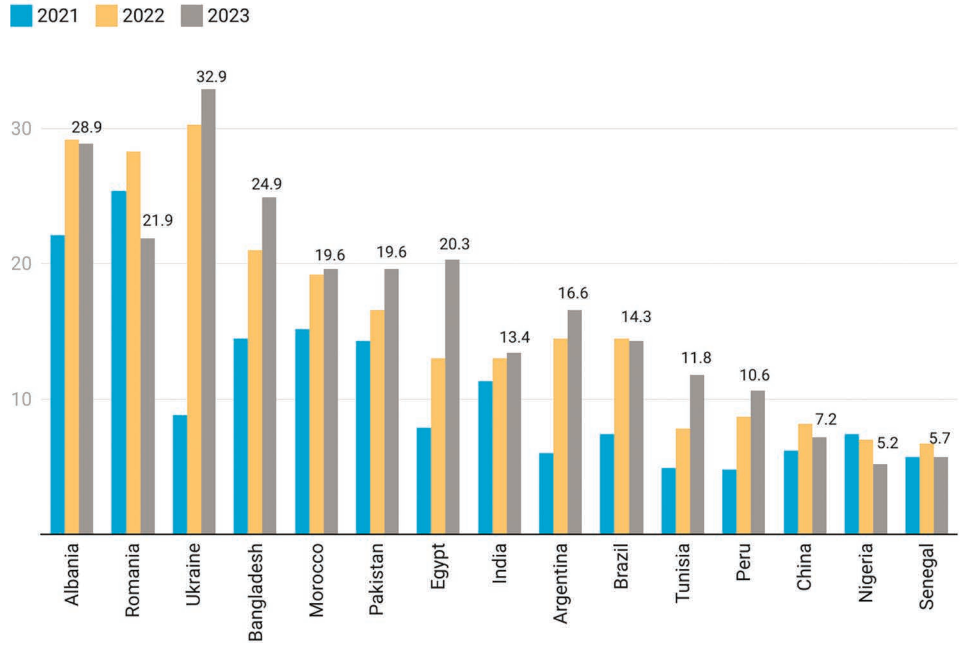
172 Ministero del Lavoro e delle Politiche Sociali, *La communauté marocaine en Italie, Rapport annuel sur la présence des migrants*, 2023.

Egyptian arrivals in Italy surpassed those of Moroccans in 2023. The Egyptian immigrant population grew sharply by 110.7% between 2021 and 2023, reaching 20,300 new arrivals. The Egyptian community numbered 155,892 in 2023, representing 3% of Italy's non-European foreign population, making Italy the leading European destination for Egyptian migrants in that year. Professionally, Egyptians are primarily employed in hospitality and catering (30%), followed by transport and business services (19.5%), and industry (15.8%). Geographically, they are heavily concentrated in Lombardy (66%) and Lazio (12.5%). The Egyptian population in Italy exhibits a marked gender imbalance, with only 32.7% women, and a high proportion of minors—nearly 32%—reflecting the notably youthful demographic profile of this community[173].

Tunisian immigration to Italy has also surged in recent years. Between 2021 and 2023, new arrivals increased by 140%, from 4,900 to 11,800. The Tunisian population in Italy stood at 98,243 in 2023, mainly residing in Emilia-Romagna (19.9%) and Sicily (19.4%). Young people under 30 represent 37.2% of this community, with a significant share of minors (25%), making it the largest age group among Tunisians in Italy. Employment for Tunisians is concentrated in the primary sector (23.4%), industry (18%), and transport and business services (15.2%). Their unemployment rate was 18.4%, compared to approximately 11% for Egyptians[174].

Figure 35 - Main countries of origin of immigrants in Italy

In thousands



Reading:
In 2023, Italy had 20,300 Egyptian nationals residing on its territory.

Chart:
Action Committee for the Mediterranean

Source:
ISTAT

Créé avec Datawrapper

173 Ministero del Lavoro e delle Politiche Sociali, *The Egyptian community in Italy, Annual report on the presence of migrants*, 2023.

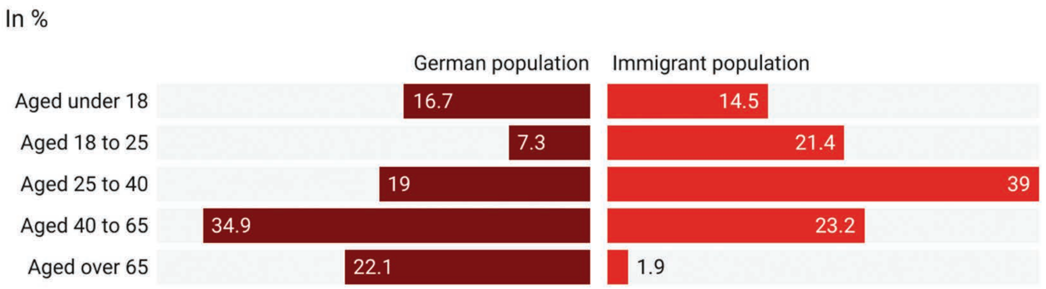
174 Ministero del Lavoro e delle Politiche Sociali, *La communauté tunisienne en Italie, Rapport annuel sur la présence de migrants*, 2023.

3.

The Economic Integration of Immigrants in Germany

In 2020, the average age of migrants arriving in Germany was 23.1 years, while the average age of the immigrant population stood at 37.7 years, compared to 47.2 years for the non-immigrant population. Immigrants therefore significantly contribute to rejuvenating the population in Germany as well[175].

Figure 36 - Age structure in 2021: A comparison between the German population and its immigrants



Reading: In 2021, 39% of the immigrant population in Germany was between 25 and 40 years old.

Chart: Action Committee for the Mediterranean

Source: Office fédéral des migrations et des réfugiés (BAMF) - 2023

Créé avec Datawrapper

In 2024, the Turkish community remains the most represented among foreign workers in Germany, with 671,670 Turkish nationals employed, out of a total of 6,283,170 foreign workers. Among immigrants from North Africa, Moroccans, Tunisians, Egyptians, and Algerians have varied profiles in terms of professional qualifications. In 2024, among foreign employees, there were 33,460 Tunisians, 25,200 Egyptians—79% of whom were men—and 9,930 Algerians, 72% of whom were men[176].

Germany has maintained a pragmatic labor migration policy to address the decline in its working-age population. However, it has also tightened its approach to managing migration flows, shifting toward a more selective and skills-based immigration system. This policy direction materialized as early as 2020 with the adoption of the Skilled Immigration Act, which facilitated access to the German labor market for foreign nationals with in-demand skills.

In June 2023, German legislation was further relaxed to broaden access to employment for immigrants. The minimum income threshold required to obtain a professional residence permit was lowered, and the list of shortage occupations was expanded. In addition to existing high-demand professions in engineering, IT, and mathematics, it now includes occupations such as veterinarians, dentists, teachers, and educators[177].

175 Federal Government of Germany, *Germany's population is increasing thanks to immigration,* 2023.

176 Bundesagentur für Arbeit, *Migration und Arbeitsmarkt*, 2024.

177 Uta Rasche, "Plus rapide et moins bureaucratique", November 1, 2023

Following the June 2023 reform, foreign professionals are no longer required to have their qualifications formally recognized in Germany, provided they hold a diploma recognized in their country of origin and have at least two years of professional experience. Only regulated professions, such as medicine and law, are still subject to recognition procedures in Germany[178].

To support its labor migration strategy, Germany also leverages diplomacy by concluding migration agreements with other states to facilitate the arrival and training of workers in shortage sectors. These so-called "win-win" agreements aim both to reduce irregular migration and open up legal migration pathways to Germany. Such agreements have already been concluded with the Western Balkans and India[179]. Berlin is considering similar agreements with Algeria, Tunisia, and Morocco[180]. However, domestic political dynamics can challenge these agreements. Despite the success of the existing agreements with the Western Balkans[181], their scope will be reduced in 2025 due to rising anti-immigration rhetoric, notably from the AfD, which secured 20.8% of the vote in the latest elections.

Thus, the German government complements its labor migration strategy with a securitized approach. On November 7, 2023, Olaf Scholz's government adopted a series of measures to reinforce border controls, combat irregular migration more effectively, and tighten asylum access conditions[182].

This dual strategy—welcoming skilled workers while tightening control over other migration flows—has yielded the results expected by the government: the number of skilled workers arriving in Germany has increased by 77% since 2021, while asylum applications have halved over the same period[183].

178 "New Ways to Recruit Skilled Workers", *The Federal Government (Die Bundesregierung)*, March 6, 2024.

179 Agreement between the Government of the Federal Republic of Germany and the Government of the Republic of India on a comprehensive migration and mobility partnership (with annexes). New Delhi, 5 December 2022.

180 Jeanette Süß, "Between Inertia and Openness: Germany Reforms Its Labor Immigration System", *Notes du Cerfa*, No. 174, Ifri, July 2023.

181 « Öffentliche Anhörung zur Fachkräfteeinwanderung », Deutscher Bundestag, May 22, 2023, available at: www.bundestag.de. Quoted in Jeanette Süß, *Op. cit.*

182 Cécile Boutelet, « L'Allemagne amorce un tournant vers plus de fermeté sur l'immigration » , *Le Monde*, November 7, 2023; *Euronews*, "L'Allemagne s'engage à prendre des mesures plus strictes pour freiner l'immigration", *Euronews*, November 7, 2023.

183 Federal Ministry of the Interior, *Immigration by Skilled Workers Up Considerably, Irregular Migration Drops Significantly,* April 1, 2025.

4.

The Economic Integration of Immigrants in Spain

In the first quarter of 2023, nearly 20% of workers in Spain were foreign nationals. Over half of the foreign workforce in Spain during the first half of 2023 came from Ibero-America (50.5%), followed by 22% from the European Union, 13.8% from Africa, 7.7% from the rest of Europe (outside the EU) and North America, and 5.9% from Asia.

During the same period, 75% of immigrants in Spain were employed in the services sector. Their representation in construction and agriculture exceeded that of native Spaniards. African immigrants made up the largest origin group in the agricultural sector, with 17.9% working in that field—far ahead of the native population (3.3%). African women were notably overrepresented in the services sector, with 82.5% of them employed there—twice as many as African men.

However, African workers often hold lower qualifications. In fact, 46.8% of immigrants of African origin had only a primary education or less, and 7.8% were illiterate. They primarily held low-skilled jobs, particularly in construction and the hospitality industry. Only 5.1% of them had a higher education level, compared to 22.4% of all foreigners in Spain.

The unemployment rate among immigrants of African origin was particularly high, reaching 29% in the first quarter of 2023—well above the average unemployment rate for foreigners in Spain, which stood at 19%[184].

It is worth noting that Spain's migration policy has recently diverged from that of other Northern Mediterranean countries by easing access to the labor market in response to declining birth rates. A reform adopted at the end of 2024 aims to facilitate the regularization of undocumented migrants, responding to the growing labor market needs in key sectors. This measure could allow for the regularization of around 300,000 people per year over a three-year period, helping to address labor shortages while promoting social inclusion[185].

184 CEU Universidad San Pablo, Observatorio Demografico CEU, *La inmigracion en el mercado laboral espanol*, 2023, p. 22.

185 « En Espagne, une réforme va faciliter la régularisation de dizaines de milliers de migrants supplémentaires par an », *Le Monde,* 19 November 2024.

Figure 37 - Employed persons in Spain by place of birth and sector of activity in the first quarter of 2023

Reading: In 2023, 52.9% of people born in Africa were employed in the services sector in Spain.

Tableau : Action Committee for the Mediterranean

Source: Observatorio Demográfico CEU

Créé avec Datawrapper

	Agriculture	Industry	Construction	Services
Spain	3,3	14,5	5,6	76,5
Total Foreigners	4,9	10,1	9,2	75,7
Africa	17,9	14,5	11,6	55,9
Iberico-America	2,4	8,6	9,2	79,8
EU-Western Europe	1,5	12,6	4,0	81,8
EU Eastern Europe and others	8,1	13,2	14,2	64,5
Non EU Europe and North America	0,7	5,8	1,8	91,7

Figure 38 - Employement by place of birth in each occupational category in the first quarter of 2023

In %

Reading: In 2023, 16.2% of people born in Africa were employed in catering, personal and protective services, or worked as salespeople.

Tableau: Action Committee for the Mediterranean

Source: Observatorio Demográfico CEU

Créé avec Datawrapper

	Spain	Total Foreigners	Africa
Managers and Executives	4,6	2,8	1,6
Scientific and Intellectual Technicians and Professionals	21,9	9,9	2,4
Support Professional Technicians	13,0	7,1	3,0
Clerical, Administrative, and Other Office Employees	11,3	6,2	2,7
Catering, Personal Services, Security, and Sales Personnel	19,6	26,8	16,2
Skilled Workers in Agriculture, Livestock, Forestry, and Fishing	2,3	1,3	4,6
Craftsmen and Skilled Workers in Manufacturing and Construction	10,1	13,2	17,8
Plant and Machine Operators and Assemblers	7,9	8,1	11,6
Elementary Occupations	8,7	24,2	40,0
Military Jobs	0,6	0,1	0,1

This brief overview clearly shows that immigrants occupy an increasingly important place in the economies of the countries on the northern shore; however, the employment structure of immigrant labor is not exactly the same: while the labor markets of the northern Mediterranean shore are highly service-oriented, the share of immigrants working in the primary and secondary sectors is higher than that of the general population.

Immigration from the southern shore of the Mediterranean fills labor shortages in the European Union, but also rejuvenates its population; yet, it is not optimally organized for several reasons. First, migration flows are criticized in the northern Mediterranean due to the rise of anti-immigration discourse, which completely overlooks the dramatic effects that population aging will inevitably have on European societies. Second, integrated value chains often confine southern countries to low-cost subcontracting roles, causing a brain drain that is detrimental to southern economies. However, the Mediterranean already functions as an integrated region, which argues for building a migration cooperation zone focused on training and value chains, in order to better organize mobility.

5.

European Public Opinions and Immigration: Rejection of Immigration but Tolerance Towards Labor Immigration

a) A Massive Rejection of Immigration in European Public Opinion

In September 2023, the think tank *Confrontations Europe*, in partnership with the ViaVoice institute, conducted an opinion poll in ten European Union countries to better understand Europeans' perceptions of mobility and immigration, both at the national and EU level. The dominant sentiment in nearly all surveyed countries is that current immigration is "too high," whether at the national or European level. For example, in Germany, 74% of respondents believe immigration is too high in their country, and 73% share this view at the EU level. Similar figures are observed in Italy, with 73% and 68% respectively, and in France, with 71% and 69%. In Spain, this perception remains prevalent but to a lesser extent: 61% of respondents consider immigration too high nationally, and 57% at the European level. Romania stands out as an exception, with 42% of respondents thinking that immigration is currently too low in their country[186].

Multiple national surveys confirm these trends. In France, an IFOP survey conducted in October 2024 shows that 73% of those surveyed think France already has too many foreigners, and 74% believe economic immigration allows employers to drive wages down[187]. In Germany, according to the ARD's *Deutschlandtrend* barometer, about 68% of respondents wish their country to accept fewer refugees as of January 2025[188]. In Italy, a report from the Censis institute published in 2024 reveals growing concern about the arrival of migrants perceived as having lifestyles "hardly compatible with those of the Italian population" (57.4% of respondents)[189]. Once again, only Spain stands out: according to a survey published in January 2025 by Funcas, 63% of Spaniards believe their country has not yet reached a critical threshold regarding immigrant reception[190].

Thus, at first glance, a plethora of polls illustrates a massive and growing rejection of immigration, both nationally and at the community level. However, a more nuanced reading invites caution in these interpretations. On the one hand, surveys reveal a significant misunderstanding of actual migration flows: respondents largely overestimate the volume of arrivals and are largely unaware of the socio-economic profiles of immigrants. On the other hand, this distrust tends to diminish once immigration is perceived as controlled and in response to clearly identified economic needs.

b) Greater tolerance among European public opinions towards labor immigration

According to a survey conducted by Crédoc for the think tank Terra Nova in May 2025, 58% of French people express support for labor immigration—that is, the targeted admission of foreign workers to meet labor market needs. Even more notably, among those who declare themselves opposed to any new immigration, 28% still favor this form of selective immigration driven by economic imperatives. Additionally, 66% of respondents support the regularization of undocumented workers employed in sectors facing labor shortages (such as catering, construction, home care), while only 32% oppose it[191].

In Germany, the rise of the AfD has not prevented the enactment of the law on June 23, 2023, which eased entry conditions for labor immigration candidates. Similarly, Italy under Giorgia Meloni has pursued a strict policy against

186 Confrontations Europe et ViaVoice, *Europe, continent d'immigration et de mobilités,* September 2023.

187 IFOP, *Balise d'opinion #283, le regard des français sur l'immigration,* 17 October 2024.

188 "Stricter asylum policy approved," *Tagesschau*, 30 January 2025.

189 "Italy: New report shows a 'fear of migrants' in more than half of respondents," *InfoMigrants*, 09 December 2024.

190 « Inmigración: los españoles valoran la diversidad, pero anticipan una asimilación a largo plazo », *FUNCAS*, 09 January 2025.

191 Sandra Hobian & Lucie Brice Mansencal, *Enquête sur les représentations à l'égard de l'immigration de travail,* Terra Nova, 12 May 2025.

irregular immigration—which dropped by 60% in 2024 compared to 2023[192]—but has nonetheless opened many channels for labor immigration through the Fiussi decree. For example, in 2023, Italy welcomed nearly 440,000 new immigrants, an increase of 38% compared to 2021[193]. Interestingly, this dual approach—strictness against irregular immigration coupled with growing acceptance of labor immigration—has not cost Giorgia Meloni any popularity points. This may indicate that such a stance is shared by public opinion.

This common shift seen in France, Germany, and Italy—though expressed through different policies and contexts—reflects a growing consensus at the European level: while irregular immigration is politically rejected, regulated and selected labor immigration is increasingly accepted as a deliberate tool to address demographic and economic imbalances.

192 Ministerio dell'Interno, Sbarchi e accoglienza dei migranti: tutti i dati, 19 March 2025.
193 Eurostat, *Immigration by age group, sex, and citizenship*, 10 April 2025.

Conclusion

At the end of this analysis, one fact stands out: the Mediterranean, far from being a demographic periphery or merely a source of migratory flows to Europe, is becoming a central space in the reshaping of the continent's human, economic, and social balances. What is often labeled as a "migration crisis" is in reality one of the visible symptoms of a broader dynamic: the growing mismatch between the demographic structures of the North and the South, between the labor needs of aging societies and the demographic vitality of southern societies.

From this perspective, the widespread fear of immigration in European public discourse directly contradicts the objective needs of economies: maintaining living standards, balancing social systems, and ensuring the sustainability of sectors under strain (healthcare, construction, personal services, etc.). The report shows that traditional internal levers (increasing female labor participation, raising the retirement age, automation, boosting birth rates) will not suffice to offset the decline in the working-age population. Demography thus becomes a factor of structural integration, where politics sometimes struggles to produce consensus.

The Mediterranean is therefore a paradoxical space: a geographic border, but also a strategic junction. Southern societies — Morocco, Tunisia, Algeria, as well as Egypt and Lebanon — hold youth reserves, growing educational potential, and deep cultural ties with Europe. The report highlights an often underestimated phenomenon: the rising skill level of migratory flows. Mediterranean migration is no longer predominantly rural, low-skilled, or informal; it increasingly involves intermediate and highly qualified profiles, especially in healthcare, engineering, and education. This evolution calls for a rethinking of migration policies, not as control mechanisms, but as tools for co-development and competitiveness.

However, integration through demography cannot be decreed. It requires anticipation, cooperation, and trust. Anticipation, because the effects of demographic transition are already underway, and action is needed upstream to adapt education, social, and economic systems. Cooperation, because no country can alone meet the intertwined challenges of aging, mobility, and geopolitical stability. And trust, because collective perceptions around immigration will continue to fuel tensions as long as political narratives remain dominated by fear rather than by constructive projects.

This report thus advocates for a geopolitical and constructive reading of Mediterranean demography. It calls for the creation of a Euro-Mediterranean mobility policy that is neither mere flow management nor a surrender to market logic, but a genuine pact of solidarity and mutual interest. Europe's demographic transition, the youth of southern countries, and economic and social interdependencies — all argue for moving beyond retreat. The challenge is not to choose between openness and protection, but to invent a new framework for integration that is lucid, structured, and assumed.

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