



ACP OBSERVATORY ON MIGRATION
OBSERVATOIRE ACP SUR LES MIGRATIONS
OBSERVATÓRIO ACP DAS MIGRAÇÕES

MIGRATION RESEARCH GUIDE

South-South Migration and Development

**Research
Guide**

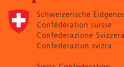
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IOM Development Fund
*Developing Capacities in
Migration Management*



ACP Observatory on Migration

The ACP Observatory on Migration is an initiative of the Secretariat of the African, Caribbean and Pacific (ACP) Group of States, funded by the European Union, implemented by the International Organization for Migration (IOM) in a Consortium with 15 partners and with the financial support of Switzerland, IOM, the IOM Development Fund and UNFPA. Established in 2010, the ACP Observatory is an institution designed to produce data on South–South ACP migration for migrants, civil society and policymakers and enhance research capacities in ACP countries for the improvement of the situation of migrants and the strengthening of the migration–development nexus.

The Observatory was established to facilitate the creation of a network of research institutions and experts on migration research. Activities are starting in 12 pilot countries and will be progressively extended to other interested ACP countries. The 12 pilot countries are: Angola, Cameroon, the Democratic Republic of the Congo, Haiti, Kenya, Lesotho, Nigeria, Papua New Guinea, Senegal, Timor-Leste, Trinidad and Tobago, and the United Republic of Tanzania.

The Observatory has launched research and capacity-building activities on South–South migration and development issues. Through these activities, the ACP Observatory aims to address many issues that are becoming increasingly important for the ACP Group as part of the migration–development nexus. Documents and other research outputs and capacity-building manuals can be accessed and downloaded free of charge through the Observatory's website (www.acpmigration-obs.org). Other upcoming publications and information on the Observatory's activities will be posted online.

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LIST OF SELECTED ACRONYMS AND ABBREVIATIONS

ABM	Agent-based modelling	EMN	European Migration Network
ACP	African, Caribbean and Pacific Group of States	EU	European Union
AIDS	Acquired immune deficiency syndrome	EUI	European University Institute
AU	African Union	FDI	Foreign Direct Investment
BMI	Federal Ministry of the Interior of Austria	FGD	Focus Group Discussions
CARIM	Euro-Mediterranean Consortium for Applied Research on International Migration	GDN	Global Development Network
CBR	Community-Based Research	GDP	Gross Domestic Product
CCA	Climate Change Adaptation	GFMD	Global Forum on Migration and Development
CGD	Center for Global Development	GIS	Geographic Information System
CRA	Community Risk Assessment	HAPI	Handheld-assisted personal interviewing
CSA	Case Study Area	HBS	Household Budget Surveys
CTM	Counter-Trafficking Module	HDI	Human Development Indicator
CVCA	Climate Vulnerability and Capacity Analysis	HDR	Human Development Report
DAC	Development Assistance Committee	HIV	Human immunodeficiency virus
DHS	Demographic and Health Surveys	ICMPD	International Centre for Migration Policy Development
DIOC	Database on Immigrants in OECD Countries	IDMC	International Displacement Monitoring Centre
DRC	Democratic Republic of Congo	IES	Income Expenditure Surveys
DRR	Disaster Risk Reduction	IHSN	International Household Survey Network
EACH-FOR	Environmental Change and Forced Migration Scenarios	ILMS	International Labour Migration Statistics
EC	European Commission	ILO	International Labour Organization
EIA	Environmental Impact Assessment	IMF	International Monetary Fund
EM-DAT	International Disaster Database		

IOM	International Organization for Migration	SEA	Strategic Environmental Assessments
ippr	Institute for Public Policy Research	SIA	Social Impact Assessment
IPUMS	Integrated Public Use Microdata Series	SLA	Sustainable Livelihoods Approach
ISCO	International Standard Classification of Occupations	STI	Sexually Transmitted Infections
IUSSP	International Union for the Scientific Study of the Population	TiP	Trafficking in Persons
LFS	Labour Force Survey	UN	United Nations
LSMS	Living Standards Measurement Studies	UNAIDS	Joint United Nations Programme on HIV/AIDS
MARS	Migration and Remittances Survey	UNCTAD	United Nations Conference on Trade and Development
MPI	Migration Policy Institute	UNDESA	United Nations Department of Economic and Social Affairs
MTO	Money Transfer Organization	UNDP	United Nations Development Programme
OCHA	United Nations Office for the Coordination of Humanitarian Affairs	UNGMD	United Nations Global Migration Database
ODA	Official Development Aid	UNHCR	United Nations High Commissioner for Refugees
OECD	Organization for Economic Co-operation and Development	UNICEF	United Nations Children's Fund
OSCE	Organization for Security and Co-operation in Europe	UNLDC	United Nations Conference on the Least Developed Countries
PAPU	Pan African Postal Union	UNODC	United Nations Office on Drugs and Crime
PHAMSA	Partnership on HIV and Mobility in Southern Africa	UNSD	United Nations Statistics Division
RDS	Respondent-driven Sampling	UPU	Universal Post Union
RSIM	Recommendations on Statistics of International Migration	USAID	United States Agency for International Development
SADC	Southern African Development Community	VCA	Vulnerability and Capacity Analysis
SAMP	Southern African Migration Project	WDI	World Development Indicators
		WFS	World Fertility Survey
		WHO	World Health Organization

FOREWORD

Dear readers and researchers,

The ACP Observatory on Migration is an initiative of the Secretariat of the African, Caribbean and Pacific Group of States (ACP), funded by the European Union. It is implemented by the International Organization for Migration (IOM) in a Consortium with 15 partners. This Consortium has been entrusted by the ACP Secretariat to carry out and guide the research activities aimed at fostering South-South migration analysis to inform policies on human mobility and development. The ACP Observatory on Migration is one of three components of the intra-ACP Migration Facility, equally led by the ACP Secretariat.

The ACP Secretariat acknowledges that mobility contributes to improving people's capabilities and to expanding individual choices for achievement of better life standards mainly through poverty reduction and the improvement of access to education at different levels and health conditions. The ACP Secretariat recognizes the importance of policy and institutional coherence which can be achieved by creating an overarching global consensus on mobility that views migration as a livelihood strategy. Furthermore, the ACP Secretariat aims at creating a human mobility framework in which the benefits of South-South mobility outweigh the costs. The question is whether there is scope for significant improvements in policies and institutions to make migration processes a positive sum game for development. This would be possible by capturing the large unrealized gains and unmet needs that are easily achievable. Mobility can achieve its full potential for development if some prerequisites related to fundamental freedoms of humans are fulfilled, including those related to the freedom of movement.

This Research Guide aims at guaranteeing a common and harmonized approach in policy-oriented studies conducted by or on behalf of the ACP Observatory. It presents the definitions of key concepts used by the ACP Observatory and Consortium for its joint forthcoming studies as well as first-hand practical examples of studies on relevant South-South migration issues which could serve local partners when developing and elaborating their research proposals.

These combined efforts aim at promoting more evidence-based policy-making as well as guaranteeing the sustainability and the ownership by governments of research initiatives conducted by or on behalf of the ACP Observatory.



Dr. Mohamed Ibn Chambas
Secretary General
Secretariat of the ACP Group of States

INTRODUCTION

Many ACP countries lack reliable and up-to-date information on migration. Additional research studies filling existing data gaps are of utmost importance to identify the contribution of migration to development. Therefore, one of the key objectives of the ACP Observatory on Migration (ACP Observatory hereafter) is to promote a better understanding of migration patterns in ACP countries. Improved knowledge is essential to identify possible ways on how migration can foster development in these countries. Thus, the ACP Observatory started gathering information on existing studies and research projects on different aspects of migration or of relevance to migration and development in the 79 ACP States.

The ACP Observatory identified major research needs for all twelve target countries - in collaboration with and endorsed by national counterparts - which will serve as a basis for the preparation of forthcoming calls for tenders for research studies to be implemented on behalf of the ACP Observatory. Programme activities of the ACP Observatory on Migration will initially be implemented in twelve pilot countries, namely Angola, Cameroon, the Democratic Republic of Congo, Haiti, Kenya, Lesotho, Nigeria, Papua New Guinea, Senegal, Tanzania, Timor-Leste and Trinidad and Tobago, while progressively being extended to other interested ACP countries.

Knowledge on intra-ACP migration is available, albeit to a differing extent among ACP countries and regions. Some studies may be outdated, others only cover specific issues, consequently highlighting relevant data gaps. An effort has been made to start gathering them in a central place to improve its dissemination among interested scholars from ACP and EU countries. Existing information on South-South migration and development aspects in ACP countries have been compiled in the Compendium¹ of studies on ACP mobility as well as national and regional overviews on migration and development in the 12 pilot countries of the ACP Observatory and the 6 ACP regions.² Together with useful links to international data sources, these documents are made available on the website of the ACP Observatory with the aim to function as a key resource of migration and development information and analyses on ACP countries.

In addition, the collection and analysis of new data is expected from the ACP Observatory. Indeed, based on the research needs identified in the 12 country and 6 regional overviews and discussed at the national and regional level, a research plan has been elaborated by the ACP Observatory. Starting in May 2011, the Observatory has launched different Calls for Tenders open to national and international institutions and individual researchers in ACP and EU countries. The ACP Observatory developed this Research Guide with the aim to promote a harmonized and common methodological approach for forthcoming research studies to be carried out by or on behalf of the ACP Observatory.

¹ See <http://www.acpmigration-obs.org/node/5>.

² See <http://www.acpmigration-obs.org>, countries and regions.

Indeed, the ACP Observatory aims at enhancing local research capacities by i) promoting a twinning approach which builds upon the expertise and experience of the Consortium partners, and ii) implementing complementary capacity building activities such as trainings on data management and data analysis.

Notwithstanding the variety of existing research guides, the ACP Observatory felt that there was a need to prepare a guidance tool tailored specifically to the research needs in ACP countries and to the ACP Observatory's research plan. Basics in qualitative and quantitative research methods do not change considerably over time. Nonetheless, there is almost no consensus or internationally accepted definition in relation to migration. Often differing understandings are used for key concepts, such as 'migrant' and 'diasporas'. Most existing research guides seem to be more appropriate for the research needs in the context of human mobility in countries with well-functioning infrastructures for data collection and analysis, such as registries, with the notable exception of the '*Migrants Count*' publication of the Center for Global Development (2009). They may also be quite extensive manuals requiring time for reading, and not being adequate for brief consultations. Technical details and theoretical considerations may also contribute to the length of some manuals. In addition, they may discuss existing sources, without providing a comprehensive list or new sources, such as the Global Migration Database by the United Nations (UN) Population Division.

How can this Research Guide facilitate research in ACP countries?

In response to the limitations of existing research tools, the Guide aims to add value in the following ways:

1. Promote a common understanding of concepts and the respect of internationally agreed definitions

Concerning the collection of new data, analysis of existing statistics and compiling qualitative information in the framework of the ACP Observatory, this manual should be used as a reference with regards to definitions of key concepts. The present Research Guide should serve as a capacity building tool for scholars developing and implementing research studies in collaboration with the ACP Observatory and its Consortium members. The list of key definitions indicated in this Guide aims at making forthcoming studies of the ACP Observatory as comparable as possible. In addition to scholars conducting studies for the ACP Observatory and its partners, the terms are hoped to be applied and disseminated by local partners.

2. Focus on research needs and be context-specific to ACP countries

Recommendations on definitions for key concepts and good research practices aim to grasp the specific contexts of ACP and other developing countries. The use and exploitation of existing data is promoted as much as possible to ensure studies can be carried out without excessive

resource implications despite certain limitations encountered in available statistics and information.

3. Provide good practice examples and templates

The illustration of good practices of existing research methodologies intends to inspire national partners in the preparation of research studies – be it of quantitative, qualitative or a combined nature. The practical research examples include *inter alia* templates for questions used in remittance surveys, possible indicators to measure the impact of migration on development and other questionnaires that could be of use.

This Research Guide is structured into three parts. The first part presents key concepts related to international migration. It recommends one definition for each notion to be used - where possible - for forthcoming research studies of the ACP Observatory. A description of the major international databases as sources of information concludes this part. The second part briefly discusses the importance of research on migration and development, indicating potential impacts of migration on development and possible indicators for measurement. The third part illustrates examples of good research practices by theme providing suggestions for the development of a research project and useful references for further information and guidance.

The present tool is aimed to be a 'living document', where methodologies pilot tested under the framework of the research activities of the ACP Observatory will be added subsequently. This will ensure the sharing of lessons learned and good practices and approaches tailored to the context of different ACP countries and regions. Therefore this Guide should be viewed as a work in progress.

PART A – CONCEPTS, DEFINITIONS AND DATA SOURCES

The migration-development nexus has received increasing attention by the international community and policymakers both in countries of origin and destination of migrants. However, available data and information on international migration are often subject to weaknesses and inconsistencies. There is an urgent need for empirically-based studies adopting sound statistical analysis for more policy-oriented research.

The main concern when developing and comparing international migration statistics is the difference in defining an “international migrant” and different “migrant groups”. Other concerns relate to the availability and completeness of data sources.

Key concepts relevant for international migration statistics are developed under the leadership of the United Nations, efforts have been made for almost a century to harmonize the processing of international migration statistics. So far, these attempts have resulted only in largely ignored recommendations. Examples include the recommendations of the International Statistical Institute produced in 1891 and 1901, of the International Labour Office (ILO) in 1922 and of the United Nations in 1976 and its latest revision - to which we will refer here - of 1998.

The concept of migration implies the movement for a certain period, from one place to another. Migration is defined as the change of place of usual residence.³ When speaking of international migration, the place of origin and the place of destination are located in two different countries and one or several borders have to be crossed. Consequently, the change of the place of usual residence within the borders of the same country is considered as internal migration.

Information on people crossing international borders is collected differently among countries – by country of birth and/or by county of citizenship and/or by migration background/descendants of foreign-born (so-called 2nd or 3rd generation) – making international comparisons more difficult. The place of birth is an objective criterion which usually does not change, but presents the disadvantage of counting as immigrants all nationals born abroad. Citizenship is legally relevant, but can change in time, be accumulated (dual citizenship) and, thus, include people who did not have actually migrated. Finally, being descendant of a foreign-born refers to the origin or ethnic group of a person, generally less considered in data collection systems but can be relevant when conducting diaspora studies. Due to these differences, it is of utmost importance to always clarify available information and the concrete meaning of the concepts used.

Besides the UN 1998 recommendations, the duration of stay is often utilised to create further categorizations of migrant populations. On the basis of the period spent abroad, it is also possible to identify long-term migrants, short-term migrants, temporary and permanent

³ See point A.2 for the definition of “place of usual residence”.

migrants (migrants for settlement), seasonal migrant workers (for only part of the year) and foreign-border workers (daily or weekly).

Another criterion is the purpose, motive or reason for moving, often divided into push and pull factors. This criterion allows grouping together work/employment-related movements (labour migrants), family-related migration (family formation and reunification), movements for educational and vocational purposes (international students). It further distinguishes between forced migration (such as victims of trafficking in persons, refugees and asylum seekers) and voluntary migration. It should, however, be mentioned that the purpose or cause for moving is of more qualitative nature, less objective and often interlinked with other reasons i.e. multiple factors convincing a person to move abroad.

The most extended inventory dedicated entirely to migration-related concepts is the IOM “Glossary on Migration – 2nd Edition” (2011).⁴ The “Multilingual Demographic Dictionary” contains definitions of basic concepts related to migration from the statistical and demographic point of view.⁵ However, glossaries with sections on basic concepts and migration terminology can be found in the annexes of many international and regional publications, annual reports, yearbooks and other periodicals of international organizations and research institutes working on migration and development issues.

This part presents key concepts related to international migration as recommended by the UN (1998 Revision 1) or commonly used by the international agencies, the regional bodies composed of ACP States. It also lists useful definitions drawn from existing glossaries produced by researcher institutions. In case a consensual or common definition is not reached for a certain concept, the Observatory recommends the most appropriate definition to the South-South and/or the ACP context. The proposed definitions should be used – where possible – in all forthcoming research studies of the ACP Observatory.

⁴ Other organizations have established more or less extended glossaries:
OECD, Glossary of Statistical Terms <http://stats.oecd.org/glossary>;
European Migration Network (EMN) Glossary <http://emn.sarenet.es/Glossary/index.do#F>
ILO Glossary, Decent Work Worldwide
http://www.decent-work-worldwide.org/index.php?option=com_glossary&func=view&Itemid=67&catid=14&term=ILO>.

⁵ UNDESA & IUSSP 1958 <http://www.demopaedia.org>

A.1 Recommended definitions for forthcoming research studies of the ACP Observatory on Migration

One of the key objectives of the ACP Observatory is to produce internationally comparable data and information which could serve to identify common trends and research needs among ACP countries. Out of the different definitions proposed in existing glossaries, this section will recommend ***one definition for each key concept to be used – where possible – in all forthcoming research studies of the ACP Observatory.***

The set of definitions suggested here is compiled mainly from existing definitions established by international, intergovernmental and regional organizations. Since the definition of the same concept may change from one source to another, the selection of a definition to be used in forthcoming studies by or on behalf of the ACP Observatory, the following criteria were considered:

- Recommendations by the United Nations or international organizations;
- Definitions used by ACP countries or regional organizations in ACP regions;
- Other definitions tailored and applicable to the ACP context.

The recommended definitions should be used - by Consortium members, local counterparts and researchers - when conducting studies on behalf of the ACP Observatory, in particular when implementing quantitative research tools. However, in some cases, the specific research objectives and/or the context in an ACP country may require adaptations of the recommended definition. It is of utmost importance to clearly and concisely indicate any variation to the proposed definition in order to allow data comparison at a later stage.

Initially, we present the basic concepts related to migration such as the country and place of usual residence, international migrant (short- and long-term), and stock and flows of migrants. The latter two concepts are mainly used by statisticians, economists and demographers and may not be of common use and understanding for migration practitioners with other educational background.

Country of usual residence: The country in which a person lives, that is to say, the country in which he or she has a place to live where he or she normally spends the daily period of rest. Temporary travel abroad for purposes of recreation, holiday, visits to friends and relatives, business, medical treatment or religious pilgrimage does not change a person's country of usual residence.

[Source: UNDESA/Statistics Division, 1998, Recommendations on Statistics of International Migration – Revision 1,

http://unstats.un.org/unsd/publication/SeriesM/SeriesM_58rev1E.pdf].

Place of usual residence: The place at which the person has lived continuously for most of the last 12 months (that is, for at least six months and one day), not including temporary absences for holidays or work assignments, or intends to live for at least six months; and/or the place at which the person has lived continuously for at least the last 12 months, not including temporary absences for holidays or work assignments, or intends to live for at least 12 months.

[Source: UN, 2008, The UN Principles and Recommendations for Population and Housing Censuses, p. 102,

http://unstats.un.org/unsd/demographic/sources/census/docs/P&R_Rev2.pdf].

International migrant: An international migrant is any person who changes his or her country of usual residence.

[Source: UNDESA/Statistics Division, 1998, Recommendations on Statistics of International Migration – Revision 1,

http://unstats.un.org/unsd/publication/SeriesM/SeriesM_58rev1E.pdf].

Long-term migrant: A person who moves to a country other than that of his or her usual residence for a period of at least a year (12 months), so that the country of destination effectively becomes his or her new country of usual residence.

[Source: UNDESA/Statistics Division, 1998, Recommendations on Statistics of International Migration – Revision 1,

http://unstats.un.org/unsd/publication/SeriesM/SeriesM_58rev1E.pdf].

Short-term migrant: A person who moves to a country other than that of his or her usual residence for a period of at least 3 months but less than a year (12 months), except in cases where the movement to that country is for purposes of recreation, holiday, visit to friends and relatives, business, medical treatment or religious pilgrimage.

[Source: UNDESA/Statistics Division, 1998, Recommendations on Statistics of International Migration – Revision 1,

http://unstats.un.org/unsd/publication/SeriesM/SeriesM_58rev1E.pdf].

Stock of migrants: All persons who live in a country at *a specific point in time* and who have previously experienced a migration movement. The stock of international migrants present in a country would be the set of persons who have ever changed their country of usual residence; that is, persons who have spent at least a year of their lives in a country other than the one in which they live at the time the data are gathered.

[Source: UNDESA/Statistics Division, 1998, Recommendations on Statistics of International Migration – Revision 1,

http://unstats.un.org/unsd/publication/SeriesM/SeriesM_58rev1E.pdf].

Flows of migrants: All persons who migrated during *a specified time period* (usually one year). The inflows of international migrants would be the arrival of persons who are changing their country of residence, while the outflows of international migrants are the departure of persons who are changing their country of residence.

[Source: UNDESA/Statistics Division, 1998, Recommendations on Statistics of International Migration – Revision 1,

http://unstats.un.org/unsd/publication/SeriesM/SeriesM_58rev1E.pdf].

South-South Migration: Movement of international migrants among countries that do not reach a very high development index (HDI) according to the UNDP classification. In its 2010 Human Development Report (HDR) report, the upper 42 countries ranked by their HDI are classified as having reached a very high HDI and are thus considered ‘developed countries’. The remaining countries of the UNDP list are considered to belong to the South and the movements of population between these countries refer to South-South migration. The list of countries ranked according to their HDI is available on the Human development Report (HDR) website under the following link: <http://hdr.undp.org/en/statistics/>.

[Source: Adapted from Bakewell, O., 2009, South-South Migration and Human Development, reflections on African Experiences. *Human Development Report Research Paper*, 2009/07,

http://hdr.undp.org/en/reports/global/hdr2009/papers/HDRP_2009_07.pdf].

Internal migration: A movement of people from one area of a country to another area of the same country for the purpose or with the effect of establishing a new residence. This migration may be temporary or permanent. Internal migrants move but remain within their country of origin (e.g. rural to urban migration).

[Source: IOM, 2011 *Glossary on Migration*, 2nd edition, IML Nr. 25,

<http://publications.iom.int/bookstore/free/IML25.pdf>].

Migrant worker: A person who is to be engaged, is engaged or has been engaged in a remunerated activity in a State of which he or she is not a national.

[Source: Art. 2(1), International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families, 1990, <http://www2.ohchr.org/english/law/cmw.htm>].

Labour migration: Movement of persons from their home State to another State for the purpose of employment. Labour migration is addressed by most States in their migration laws. In addition, some States take an active role in regulating outward labour migration and seeking opportunities for their nationals abroad.

[Source: IOM, 2011, *Glossary on Migration*, 2nd edition, IML Nr. 25, <http://publications.iom.int/bookstore/free/IML25.pdf>].

Skilled migrant: A migrant worker who, because of his or her skills or acquired professional experience, is usually granted preferential treatment regarding admission to a host country (and is therefore subject to fewer restrictions regarding length of stay, change of employment and family reunification).

[Source: IOM, 2011, *Glossary on Migration*, 2nd edition, IML Nr. 25, <http://publications.iom.int/bookstore/free/IML25.pdf>].

Circular migration: The fluid movement of people between countries or places, including temporary or long-term movement. Circular migration means repeated migration experiences involving more than one emigration and return and includes internal or rural-urban migration.

[Source: Adapted from IOM, 2011 *Glossary on Migration* - 2nd edition, IML Nr. 25, <http://publications.iom.int/bookstore/free/IML25.pdf>; Wickramasekara, P., 2011, *Circular Migration: A Tripe Win or a Dead End*, *Discussion Paper No. 15*, ILO, Geneva, <http://www.gurn.info/en/discussion-papers/no15-mar11-circular-migration-a-triple-win-or-a-dead-end>].

Diasporas: People living outside their country of origin, irrespective of citizenship and nationality and who are willing to contribute to the development of their origin country and/or community. [Source: adapted to be used for all ACP countries from African Union, 2005, Expert Meeting from Member States on the Definition of the African Diaspora, 11-12 April 2005, Addis Ababa, Ethiopia,

<http://www.africa-union.org/organs/ecossoc/Report-Expert-Diaspora%20Defn%2013april2005-Clean%20copy1.doc>].

Digital diasporas: Diasporas organized on the Internet. [...] They use the Intranet to negotiate their identity and promote solidarity; learn, explore, and enact [...] values; and mobilize to pursue [...] policy influence, service objectives, and economic participation in the homeland. [Source: Adapted from Brinkerhoff, J., 2009, *Digital Diasporas, Identity and Transnational Engagement*, Cambridge University Press, New York].

Transnationalism: The process whereby people establish and maintain socio-cultural connections across geopolitical borders.

[Source: IOM, 2011, *Glossary on Migration*, 2nd edition, IML Nr. 25, <http://publications.iom.int/bookstore/free/IML25.pdf>].

Remittances: The sum of compensation of employees and personal transfer from border, seasonal, and other short-term workers who are employed in an economy where they are not resident and of residents employed by non-resident entities.

Compensation of employees: income of migrant workers who live in the host country for less than a year, and the income of resident workers who are employed by embassies, international institutions and foreign companies;

Personal transfers: all current transfers in cash or in kind made or received by migrants to or from individuals in the origin country.

Supplementary Items related to remittances: (i) 'Personal Remittances' (the sum of personal transfers and net, or 'take home', compensation of nonresident workers), (ii) 'total remittances' (the sum of personal remittances and social benefits) and (iii) 'total remittances and transfers to non-profit institutions serving households' (NPISHs, also includes donations). These three items are considered supplementary, but not mandatory for remittances statistics. They are cumulative measures of different items. To ensure consistency of time series, workers' remittances will be included in the statistics as a supplementary item.

[Source: International Monetary Fund (IMF), 2009, *Balance of Payments and International Investment Position Manual*, 6th edition (BPM6), IMF, Washington, D.C., <http://www.imf.org/external/pubs/ft/bop/2007/pdf/bpm6.pdf>]

Informal remittances: All monetary and in-kind transfers of goods through channels other than banks and other financial institutions (such as micro-finance institutions, MFIs, and postal offices) captured in national balances of payments as defined by the IMF definition of "international financial remittances" (see definition of remittances above).

[Source: Own definition, ACP Observatory on Migration, 2011].

Irregular migrant: A person who, owing to unauthorized entry, breach of a condition of entry, or the expiry of his or her visa, lacks legal status in a transit or host country. The definition covers inter alia those persons who have entered a transit or host country lawfully but have stayed for a longer period than authorized or subsequently taken up unauthorized employment (also called clandestine/undocumented migrant or migrant in an irregular situation). The term “irregular” is preferable to “illegal” because the latter carries a criminal connotation and is seen as denying migrants’ humanity.

[Source: IOM, 2011, *Glossary on Migration*, 2nd edition, IML Nr. 25, <http://publications.iom.int/bookstore/free/IML25.pdf>].

Trafficking in Persons: The recruitment, transportation, transfer, harbouring or receipt of persons, by means of the threat or use of force or other forms of coercion, of abduction, of fraud, of deception, of the abuse of power or of a position of vulnerability or of the giving or receiving of payments or benefits to achieve the consent of a person having control over another person, for the purpose of exploitation.

[Source: Article 3(a) UN Protocol to Prevent, Suppress and Punish Trafficking in Persons, Especially Women and Children, supplementing the United Nations Convention against Transnational Organized Crime, 2000, http://www.uncjin.org/Documents/Conventions/dcatoc/final_documents_2/convention_%20traff_eng.pdf].

Smuggling of migrants: The procurement, in order to obtain, directly or indirectly, a financial or other material benefit, of the illegal entry of a person into a State Party of which the person is not a national or a permanent resident.

[Source: Article 3(a) UN Protocol against the Smuggling of Migrants by Land, Sea and Air, supplementing the United Nations Convention against Transnational Organized Crime United Nations, 2000, http://www.uncjin.org/Documents/Conventions/dcatoc/final_documents_2/convention_smug_eng.pdf].

Refugee: A person who owing to well-founded fear of being persecuted for reasons of race, religion, nationality, membership of a particular social group or political opinion, is outside the country of his nationality and is unable or, owing to such fear, is unwilling to avail himself of the protection of that country; or who, not having a nationality and being outside the country of his former habitual residence as a result of such events, is unable or, owing to such fear, is unwilling to return to it.

[Source: Article 1A (2) of the 1951 Convention relating to the Status of Refugees as modified by the 1967 Protocol].

Asylum seeker: A person who has left the country of origin, has applied for recognition as a refugee in another country, and is awaiting a decision on their application.

Internally Displaced Persons: it means persons or groups of persons who have been forced or obliged to flee or to leave their homes or places of habitual residence, in particular as a result of or in order to avoid the effects of armed conflict, situations of generalized violence, violations of human rights or natural or human-made disasters, and who have not crossed an internationally recognized State border.

[Source: African Union Convention for the Protection and Assistance of Internally Displaced Persons in Africa (Kampala Convention)

http://www.afrimap.org/english/images/treaty/AU_KampalaConvention_Protection-Assistance-Internally-Displaced.pdf].

Internal displacement: it means the involuntary or forced movement, evacuation or relocation of persons or groups of persons within internationally recognized state borders.

[Source: African Union Convention for the Protection and Assistance of Internally Displaced Persons in Africa (Kampala Convention)

http://www.afrimap.org/english/images/treaty/AU_KampalaConvention_Protection-Assistance-Internally-Displaced.pdf].

Unaccompanied minors: Any person under 18 years of age or under a country's legal age of majority, separated from both parents, and not with and being cared for by a guardian or other adult who by law or custom is responsible for them. This includes minors who are without any adult care, minors who are entirely on their own, minors who are with minor siblings but who, as a group, are unsupported by any adult responsible for them, and minors who are with informal foster families.

[Source: UN, 1997, Report of the UNHCR, Questions relating to Refugees, Returnees and Displaced Persons and Humanitarian Questions. Assistance to Unaccompanied Refugee Minors. Report of the Secretary-General.

<http://www.un.org/documents/ga/docs/52/plenary/a52-273.htm>].

Migration influenced by environmental change: Where environmental change can be identified as affecting the drivers of migration, and thus is a factor in the decision to migrate. (This concept acknowledges that migration is already occurring in most parts of the world as a result of these drivers. The decision to migrate is influenced by five broad categories of 'drivers': economic, social, environmental, demographic and political. This influence is most pronounced for economic, environmental and, to a lesser degree, political drivers.)

[Source: Foresight: Migration and Global Environmental Change (2011). Final Project Report. The Government Office for Science, London. <http://www.bis.gov.uk/foresight/migration>].

Non-migration influenced by environmental change: Where environmental change can be identified as affecting the drivers of migration, and thus is a factor in the decision *not* to migrate.

[Source: Foresight: Migration and Global Environmental Change (2011). Final Project Report. The Government Office for Science, London. <http://www.bis.gov.uk/foresight/migration>].

Human development: Human development is a process of enlarging people's choices. Enlarging people's choices is achieved by expanding human capabilities and functionings. At all levels of development, the three essential capabilities for human development are for people to lead long and healthy lives, to be knowledgeable and to have a decent standard of living. But the realm of human development goes further: essential areas of choice, highly valued by people, range from political, economic and social opportunities for being creative and productive to enjoying self-respect, empowerment and a sense of belonging to a community. The concept of human development is a holistic one putting people at the centre of all aspects of the development process.

[Source: UNDP, 2010, *Human Development Reports, Glossary of terms*.

<http://hdr.undp.org/en/humandev/glossary/>].

A.2 Main data sources concerning international migrants

Data sources collecting information on international migrants have been largely discussed in existing literature (see for instance Bilsborrow et al, 1997; Batalova et al., 2008; IOM, 2008; Schachter, 2008; Cantisani, 2009; CGD, 2009). The most common data collection systems producing information on international migrations include population and housing censuses, population registers, administrative records, border statistics and sample (household) surveys:

A.2.1 Population censuses

Census items and tabulations relative to international migration have grown in importance to follow the growing interest in international migration among countries. Censuses present a wide ranging coverage and, thus, useful source for the stock of migrants living in a country at a given time.

The revised United Nations Recommendations on Statistics of International Migration underscores population censuses as being the best source for collecting data on the immigrant stock and its characteristics. Therefore, the UN Principles and Recommendations for Population and Housing Censuses (UN, 2008), targeting the 2010 round of censuses, are mainly concerned with the topic of immigrant stock rather than immigrant flows.

Moreover, even observed stock data derived from censuses are subject to underestimation especially for migration. For instance, irregular migration may not be totally captured by censuses. Therefore, users need to be fully aware of these weaknesses when drawing conclusions from the data. Moreover, emigration of entire households cannot be observed due to the lack of a respondent for the survey. Overestimation can occur when many respondents refer to the event of migration related to the same person.

The items related to international migration recorded through census questionnaires, as recommended by the UN (2008), are: a) Country of birth, b) Citizenship and c) Year or period of arrival. They are all labeled as 'Core Topics'. Other related characteristics, mainly useful for internal migration measurement, are: a) Place of previous residence and b) Place of residence at a specified date in the past. The answer to these two later questions could be a foreign country. Census data also allow the estimate of the intercensal net migration taking into account the current and the latest census population and vital registers of births and deaths between censuses. This is an indirect measure for obtaining migration information called the residual method.

It is common to find that the need for information relates to population groups such as those who were not born in that country and those who do not have the citizenship of the country where they live (UN 2008) rather than the generality of international migrants as characterized by change of residence through the definition presented in the revised Recommendations on Statistics of International Migration RSIM (UN 1998).

Therefore, for studies related to international migration using the population census, the foreign-born and the foreigners living in the country represent the two sub-groups of primary focus. Some countries may collect information on country of birth of parents, depending upon certain circumstances and conditions. This item allows the identification of the descendants of foreign born and the migration background of respondents. The so-called, first, second, third, etc. generations are identified following this criteria. Also, this can be used to study the integration processes and outcomes of immigrants and their descendants. Moreover, information from this topic allows for the group of foreign-born children of native born parents to be identified. This could be useful for the study of return migration.

As for country of citizenship, additional information could be collected so as to permit the classification of the population into (a) citizens by birth and (b) citizens by naturalization. Dual or multiple citizenship and previous citizenship after naturalization could be also used for specific analysis purposes.

On the other hand, although the issue is sensitive in some specific contexts, censuses may record information on the ethnicity measured using a variety of proxies and concepts: ethnic ancestry or origin, ethnic identity, cultural origins, nationality, race, colour, minority status, tribe, language, religion or various combinations of these concepts. Religion and language can also be recorded while the interest on specific groups of people like the nomads and Indigenous peoples may be relevant in certain circumstances.

Ethno-cultural characteristics

To obtain comprehensive information characterizing international migrants identified as foreign born or foreigners through the census, it would be useful to tabulate data according to the analysis needs. This is why census data have a substantial added value for the study of migration.

Depending of the research purposes, general tabulation may include data by (a) sex, (b) age, (c) place of residence, (d) marital status (g) education, (h) economic activity, employment status, (j) industry, (k) occupation, and (l) type and size of household.

A.2.1.1 UN Recommended tabulations on international migration and immigrant stock

- 1- Foreign-born population, by country of birth, age and sex
- 2- Foreign-born population, by year or period of arrival, country of birth, age and sex (basic/essential).
- 3- Population, by country of birth and citizenship, age and sex.
- 4- Economically active foreign-born population ... years of age and over, by year or period of arrival, main occupation and sex. (The minimum age adopted by the country for enumerating the economically active population).

A.2.1.2 UN Additional tabulations on international migration and immigrant stock

- 1- Foreign-born population, by marital status, age and sex.
- 2- Foreign-born population ... years of age and over, by current (or usual) activity status, age and sex. (The minimum age adopted by the country for enumerating the economically active population).
- 3- Foreign-born population ... years of age and over, by educational attainment, age and sex. (The lower age-limit should be the usual age for entrance into school).

The same general tabulation recommended for the overall population can be separately reproduced for foreign born, native, foreign and national population sub-groups. These data are the basis to compare diverse population subgroups as for assessing their respective contribution to the age and sex structure of the population and to the overall demographic and socioeconomic population profile.

In the ACP countries, as worldwide, statistics about the ethnic composition of international migrants together with information about country of birth and citizenship will help to more precisely determine the flows and volume of international migration. Information about knowledge of the official language of the country would be very useful for studying the integration of international migrants.

A.2.2 Administrative records

This seems to be one of the “less travelled ways” while looking for data, either on migration or any other topics, especially in developing countries. Data such as residence and work permits as well as visa-types can be used to measure migration stocks (e.g. total number of foreigners holding current residence and/or work permits) as well as flows (e.g. estimates of inflows are based on new permits issued to foreigners over the year). Outflows are instead more difficult to

measure through administrative records since it requires identifying the number of nationals who leave the country without formal declaration and the number of foreigners who leave the country due to the expiration of their permit of stay (as opposed to over-stayer remaining in the country with an irregular status).

As data are not collected to primarily measure migration, but rather for administrative reasons, they do not abide by recommended international migration statistics standards and, thus, present limited international comparability. However, there are still much useful data and information to compile using the administrative records especially in countries with less developed statistical systems. The impediment for full use of administrative data is situated at one or both of the two levels:

- a) Data exists and is ready to be used for migration statistics but they are not accessible by the users for diverse reasons including institutional, legal and bureaucratic ones.
- b) Data is not ready for statistical purposes either because it is difficult to process (exist on hard copies or folders) or not available at all.

Therefore, the bureaus collecting or in charge of data should be targeted with appropriate capacity building actions with user friendly data entry programmes while benefitting from the spread use of computational facilities. Standardized forms/questionnaires fitting each administration needs, could be suggested to ease the data collection for migration statistics while enhancing the productivity of administration. The support of the national statistical offices is determinant for the accomplishment of the capacity building process.

A wide range of institutions and departments could hold diverse administrative information which could be used for migration statistics. The most important are the Ministry of Home Affairs, generally mandated for deliverance of permits of stay or residence permits, the Ministry of Labour for work permits and the Ministry of Foreign Affairs for data on nationals abroad and data on visas delivered to foreigners.

A.2.3 Population registers or registers of foreigners

They are part of official accounts of legal residents within a country, available in some countries with sophisticated statistical systems although not always accessible for privacy and ethical reasons. These registers can measure the stock of international migrants, as well as their in-flows and out-flows. They represent a source of data which is regularly updated and often collect information on characteristics of migrants (age, sex, citizenship, education, occupation, etc.). However, people (both natives and immigrants) often fail to de-register, while undocumented immigrants, particularly those of a short-term nature, are usually missed by

these registers. Furthermore, different countries have different criteria for including foreigners in flow data (e.g. asylum seekers), which can make comparability a problem. This source of information is not relevant at the time being for the ACP countries due the costs that it needs to be implemented and maintained.

A.2.4 Data from consulates

Consulates of both receiving and sending countries hold data on emigrants and immigrants. In a given country, data on nationals abroad can be extracted from the consulates' registers of the Ministries of Foreign Affairs. They contain basic demographic and socioeconomic information on emigrants of a specific country. Migrants are supposed to register themselves in the consulate either spontaneously for identification or compulsory for need of administrative services. The Foreign Affairs services hold also data on immigrants while issuing entry visas for foreigners who are entitled to this procedure. Visa forms include useful socio-demographic information for migration statistics such as socio-demographic characteristics of the migrants and his/her migration purpose and intended duration of stay. However, this source of information is not exhaustive since not all foreigners are entitled to the entrance visa.

A.2.5 Border statistics

This sources includes information collected for or at international borders (entries and exits), such as by visa-type or entry/exit cards. Visa-types allow migrants (both in and out) to be categorized and are often used to measure labour migration flows. Quality and coverage of border statistics vary between countries according their border policy and the permeability of borders. Unauthorized migrants apprehended at borders are often registered, thus become a source for estimating irregular migration into a country. Furthermore, in many countries border posts are often not computerized and/or border data is not always processed.

In most countries, the usefulness of border statistics can be enhanced with capacity building on appropriate computational programmes and techniques and by adapting the form/questionnaire to statistical processing. Indeed, some receiving countries, with the contribution of statistical offices and home affairs services, have developed appropriate forms and techniques for data collection through entry/exit cards.

A.2.6 Sample surveys

They are similar to national censuses but cover a limited number of persons (or households) who represent the population as a whole. The sample can be drawn from different sampling units such as a household, an individual (e.g. border/passenger survey, an establishment etc.). Sample surveys are either cross-sectional (conducted at one point in time) or longitudinal (follow a person or household members over time, e.g. panel data), and can be devoted totally or partly to measure international mobility or migration. Household surveys, for instance, may have a general purpose (multi-topic) focusing mainly on labour force and employment (with only limited number of migration questions and reduced migrant sample) or be more specialized with main focus on migration (including detailed questions and a limited sample size, often not nationally representative).

Household surveys work best for measuring characteristics and the impact of migrants and migration on sending and receiving countries and on migrants themselves (by inquiring dimensions such as reason for moving or remittances), and less so for measuring size of migration flows or stocks. They reduce cost by using a representative sample of the population and increase frequency of data collection (compared to national censuses), allow more flexibility on the number and types of questions which can be asked (i.e. can be tailored to specific research needs or policy concerns) and may include also irregular migrants in their sample. However, coverage is often limited as there is a certain difficulty in finding migrants in regular sampling frames and measuring flows requires sufficiently large sample sizes. The use of proxy respondents (questions for all household members are answered by one person in the household) and sensitivity of questions (e.g. ethnicity, remittances) may lead to inaccurate answers and non-response.

The major challenge for survey data on migration rises at the sampling stage. Households with migrants are generally rare and spread all over the country under study except for countries with high presence of migrants. Hence, limiting the survey to areas with high presence of migrants could be the unavoidable choice to reach the migrants households while losing in terms of national representativeness. Another alternative is to interview directly migrants and migrants' household members at the entry/exit points (airports, ports, land points). In some cases, in order to reduce the costs and practical difficulties induced by probabilistic sampling processes, the quota and the snowball sampling methods are used as alternatives. Both are not probabilistic and their outcome could not be as much trusted as those resulting from probabilistic survey samples.

However, besides considerable savings of time and financial means, these non probabilistic options suits difficult situations of specific surveys on migrants in a country with very low presence of migrants. Surveys based on a national sampling frame of a census are not recommended to conduct in this case. However, the census could be used as a starting point for

preliminary framing of the studied phenomena (i.e. return migration). The snowball method can be used afterwards as complementary after identification of starting unities while the quota method can start from census data to establish the proportions. In case of national surveys including sections on migration (surveys on demography, employment, living standards, etc.), the census sampling frame could be used but the representativeness of migrants subgroups is not guaranteed while the non-migrants households could be sufficiently represented.

A.2.7. Examples of migration related surveys and their applications

Demographic and Health Surveys: Migration is not well explored through demographic surveys unlike mortality and fertility - the two other demographic phenomena. Fertility has always gained high interest through specific international surveys conducted to assess its levels and trends over time through appropriate indicators. This was mainly driven by family planning motives due to the global concerns related to population booming facing scarce resources. The WFS (World fertility Surveys, 1972-84, 41 countries), DHS (Demographic and Health Surveys), followed by a wide range of surveys on Fertility, contraceptive prevalence, family planning, health, child health and reproductive health are examples of surveys undertaken in developing countries and have contributed directly to estimation of development indicators and indirectly to raw estimations of migration. The pioneering demographic surveys measuring the demographic change through its tree facets: fertility, mortality and migration (internal and international) in Africa are the so-called *Enquêtes Démographiques à Passage Répétés* (panel or longitudinal demographic surveys). They were conducted since the end of the 1960s.

LSMS surveys: Living Standards Measurement Study (LSMS) is initiated by the World Bank mainly for poverty assessment. Since 1985, over 100 LSMS surveys were conducted in more than 30 developing countries worldwide including ACP countries. Migration was not a priority in LSMS surveys before the year 2000. Currently, migration prototype modules of 15 to 20 questions are developed by the World Bank and are being used within the LSMS surveys of a number of countries. These surveys have been very useful to assess the impact of remittances on poverty alleviation and the volume of informal and in kind remittances received by households filling partially the gap registered by the balance of payment statistics.

National routine surveys: Some countries have routine household surveys such as Labor Force Surveys (LFS), Household Budget Surveys (HBS), Income Expenditure Surveys (IES), etc. Some surveys have a panel component while some are more or less rich depending on the size of the migration module. However, in general, the richness of the survey comes at the cost of smaller sample size or weak representativeness of migrants.

As for this guide we recommend the use of the Survey Data Catalogue for Migration Studies – 'Migration in National Surveys' (MiNS) – created by the Sussex Centre for Migration Research,

Migration, Globalisation and Poverty (Migration DRC) as a catalogue of existing household survey and census datasets that contain information about migration in developing countries with an additional focus on child migration. We also recommend the use of the survey and census catalogue of the International Household Survey Network (IHSN). It is a web directory of census and household survey data for developing countries worldwide (145 countries). Researchers could use both directories to identify surveys and censuses in their ACP country of interest to access information, questionnaires and other survey documents for surveys undertaken between 1950 and 2008.

A.2.8 Other useful data sources on migration

Data from university research: data collected at the university by researchers and, especially, students while preparing their final reports. Some reports are prepared upon field work and empirical data. However, these data should be considered with high cautiousness.

Unused raw data from surveys and census: old raw data files can be reprocessed for emerging new data needs. This also could be very useful for the overtime comparisons and for assessing relationship between variables that were not expected to be part of the explanatory models in the past. As a significant example, the emergence of the migration and environment nexus could be assessed through data from old surveys.

A.3. Checklist for meaningful international data sources

International migration data and information is generally offered by diverse data producers and/or compilers. However, the multiplicity of sources is even sometimes an impediment to harmonization due to diversity of concepts and different measurement and estimation methods. Access to data is nowadays largely facilitated by the open access to a large set of online statistical databases, yearbooks and other periodicals. National, regional and international statistical services publish meaningful statistical data on migration and migrants, obtained through diverse data collection and estimation methods.

Most of data producers, especially in developed countries, provide metadata explaining concepts and methods of measurement and estimation.⁶ However, metadata is not always available making it quasi impossible to draw accurate conclusions and make precise and useful comparisons. The collection of data is strongly related to the socioeconomic and political purpose it is gathered for. However, migration is sometimes considered a politically sensitive topic and data is often scattered between different ministries.

⁶ Metadata is data that defines and describes other data. Therefore, it is also known as “data on data”.

Migration is always seen as a challenge by some and opportunity by others, but no longer a mere neutral phenomenon, increasing the interest for the assessment of its impacts and interactions along with its diverse related topics. Yet increasingly migration's positive aspects are recognized, which highlights the need for reliable evidence on the interrelationships. Indeed, a forthcoming manual by IOM, ILO, UNICEF and UNDP focuses on how to mainstream migration into development planning.

After a series of recommendations initiated by the International Labour Bureau, the United Nations has elaborated the "Recommendations on Statistics of International Migration, Rev. 1 (1998)" with the aim to harmonize definitions on international migration. Today, these recommendations seem to be less followed by data producers and the main reason is that they do not respond to specific practical needs related to the duration and purpose of stay. Some definitions are subject to refinements and suggestions are made to make the definitions more relevant and widely applicable. However, the most visible aspect of these definitions seems to be the definition of the 'international migrant' concept while the other recommendations seem to be underused.

In 2008, the United Nations with support of its Technical subgroup on internal and international migration statistics released the revision 2 of its Principles and Recommendations for Population and Housing Censuses, containing practical recommendations on data collection on international migration. The Characteristics to be identified are: (a) Country of birth (b) Citizenship and (c) Year or period of arrival in the country. The value of these characteristics rises when crossed with other census data (geography, individual demographic and socioeconomic characteristics and housing conditions).

Besides the United Nations and International Labour Organization recommendations, the United Nations Population Division is publishing data on international migration worldwide using empirical data and estimations. The following list provides most data compilers worldwide with their statistical resources and availability. The nature of data depends on the covered topic by each organization. It ranges from mere stocks and flows to other characteristics including education, employment, forced migration and remittances.

- National Bureaus of Statistics: Large sets of migration data are compiled and made available in statistical databases of receiving countries of migrants, with developed statistical systems. The periodicity of data depends on the data collection method used: census, population registers, surveys, administrative records, etc. Some bureaus provide detailed information on migration with regular updates.
- United Nations Population Division of the Department of Economic and Social Affairs (UN DESA): Empirical data available through the 'Global Migration Database' (UNGMD, web-based) and 'International migration flows to and from selected countries: The 2008 Revision'. Estimates are available through the 'Trends in international migrant stock: The

- 2008 Revision’ which is a web-based migrant stock database and ‘Trends in international migrant stock: The 2008 Revision CD-ROM’. [<http://www.un.org/esa/population/>].
- The United Nations Conference for Trade and Development (UNCTAD): the Database contains a wide range of variables related to migration such as remittances (total and as share of GDP) and other financial flows such as Official Development Assistance (ODA) and Foreign Direct Investments (FDI). Data on population, urbanization, labour force (total and in agriculture) are also available. The key advantage of this database is that data are available for individual or grouped ACP countries, geographic subdivisions or grouped countries based on economic or trade-groupings. The database provides time series covering long periods and is accessible on line on the website: [<http://unctadstat.unctad.org>].
 - World Bank: Data are compiled from a wide range of worldwide sources are available through the online World Development Indicators (WDI) of the World Bank. These data include basic Migration statistics on remittances (with other financial flows), net migration, migrants stock, migration of highly skilled and data on refugees. The Migrations and Remittances Factbook is also considered a source for international migration data. [<http://data.worldbank.org/data-catalog/world-development-indicators>].
 - International Monetary Fund: Provides data on remittances through the “Balance of Payment Statistics Yearbook”. Online Balance of Payments Statistics are available with authorized access. [<http://www2.imfstatistics.org/BOP/>]
 - United Nations High Commissioner for Refugees (UNHCR): The UNHCR Statistical Online Population Database (web-based) and the UNHCR Statistical Yearbooks (online) provide data and statistical reports on the people of concern to UNHCR: refugees, asylum seekers, returned refugees, internally displaced and stateless people around the world. [<http://www.unhcr.org/pages/4a013eb06.html>].
 - International Labour Organization (ILO): International Labour Migration Statistics (ILMS, web-based). It provides, according to data availability for each country, stocks and flows of total and migrant population by country of destination/origin, sex, age, economic sector, occupation and employment status. The NATLEX database is specialized on national labour, social security and related human rights legislation maintained by the ILO's International Labour Standards Department containing legislations on “Migrant Workers”. [http://www.ilo.org/public/english/protection/migrant/info/ilm_dbase.htm].
 - Organization for Economic Co-operation and Development (OECD): the DIOC-EXTENDED (DIOC/E, web-based) database of the OECD provides compiled data and information on demographic, labour market and educational characteristics of native and immigrant

(foreign born) population (generally aged 15+) in 30 OECD and 25 non-OECD receiving countries. The OECD International Migration Database, also web-based, provides statistics on immigrant population (generally foreign born) flows (in and out). The database provides annual series for the most recent years (in general 1990-2007). [<http://stats.oecd.org/Index.aspx?DataSetCode=MIG>].

- Eurostat: Online database provides statistics and basic characteristics on migration flows and stocks, acquisition of citizenship and asylum applications as well as statistics on the enforcement of immigration legislation and on residence permits. Data are compiled from the national statistics bureaus of the EU member States. [<http://epp.eurostat.ec.europa.eu/portal/page/portal/population/data/database>].
- Research Centres: Some research centres have recently developed their own databases by compiling data originating from diverse national sources and/or by estimating data through diverse methodologies. Data are sometimes limited to specific areas of interest of these centres. Following is the list of some examples:
 - DRC-Sussex: Global Migrant Origin Database (online), provide matrix of migration origin destination based on census data. [http://www.migrationdrc.org/research/typesofmigration/global_migrant_origin_data_base.html].
 - CARIM-EUI: Euro-Mediterranean Migration Database (web-based) which contains statistics and Legislations and Socio-political information, records and citations from sending and receiving countries. [<http://www.carim.org/index.php?callContent=4>].
 - MPI: the MPI data hub (web-based) and contains data, charts and maps based on data from international organizations. [<http://www.migrationinformation.org/datahub/>].

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PART B – RESEARCH ON MIGRATION AND DEVELOPMENT

Researching the impact of South-South migration on development is a core objective of the ACP Observatory on Migration. To better assess, monitor and evaluate the impact of migration on development, the Observatory proposes a set of indicators for impact measurement building upon existing research on the migration and development.

Human mobility has long been considered an essential strategy for improving individual wellbeing. It can be adopted to cope with changing life conditions threatening human survival, be it from nature or humans themselves. Many people also move to better their living conditions. Unequal distribution of opportunities and wealth mixed with large demographic discrepancies are considered to be key drivers to migration. Demography, along with the migration intentions of youth, is a key component of migration potential due to its impact on labour supply within countries. Although most developing countries host growing and disproportionately youthful populations, disparities of wealth and pressure on resources could become push factors for mobility between these countries. Moreover, the skill structure (e.g. population distribution by level of education) of the population and the labour market needs can be determinant.

Researching the impact of South-South migration on development is a core objective for the ACP Observatory. To better assess, monitor and evaluate potential impacts on migration, the ACP Observatory proposes a set of core indicators - building upon existing research findings - for its forthcoming research studies on migration and development.

B.1 Impact of migration on development

Sound research has proven that migrant workers gain substantially from mobility in terms of income increase. Financial remittances can boost households' income in countries of origin and help reducing poverty. Changing consumption patterns of remittance-receiving households and improvements in food security reveal some of the potential positive impacts and need to be further analysed. However, the impact of mobility is not limited to increases in income. Indeed, broader measures of well-being such as education, health and empowerment of women and girls can be scrutinized for the impact of mobility, with important implications on their realization of basic human rights. However, impacts can be direct or indirect, simple or composite, so that it is difficult to establish an exhaustive list of potential impacts. Background research for the UNDP *Human Development Report* of 2009 finds that in general, migrants are more likely to improve their health and education levels than those who stay in the origin country. Moreover, human mobility often leads to transfer of considerable human and social

capital and flows of ideas and values that can impact on the social, cultural and political development of origin societies.

Migration does not only have positive impacts, at least over the short term. The potential gains described above are not guaranteed for every single migrant and may increase inequality. At the community level, the evidence of the impact of mobility is also mixed. When migration is prompted by unexpected emergencies (such as conflict, food insecurity, rising energy and oil prices, droughts or climate-related factors), people who would have otherwise stayed are compelled to migrate under dangerous or unpredictable conditions. People who move under such circumstances can end up worse off as a consequence of a lack of access to services, integration challenges, lack of knowledge of new social and/or working environments, trafficking or conflicts, etc. This can also happen to migrants who move voluntarily, especially those who do not carefully prepare their migration project or are misinformed and have unrealistic expectations from their mobility.

The impact of South-South remittances is not expected to be as significant as for South-North flows. The amount of the latter is usually higher due to larger wage differentials, even if it concerns fewer migrants sending money. However, financial transfers often hide the financial costs of moving and the losses in quality of life for those who are remitting large parts of their savings, comprising their living standards in the host countries. Migrants and their family members residing in destination countries may experience unequal access to education and health care services and treatment due to a lack of knowledge, inadequate integration policies and/or their status as irregular or forced migrants. Moreover, remittances can stimulate inflation in the country of origin which reduces access to basic commodities of households not receiving remittances and, thus, increases the poverty gap. However, every increase in income may lead to an increased consumer index and is thus not limited to remittances inflows (Melde and Ionesco, 2011).

In conceptual terms, research and policy debates over the past decade have tended to focus on the aspects of South-North migration and its links to development and vice versa. Focusing on intra-regional mobility and migration among ACP and other developing countries necessitates highlighting that countries in the South are also countries of destination. The migration – development nexus in this context may thus entail implications in terms of human development on both countries of origin and destination. Indeed, the focus is often on emigration of skilled nationals or the so called ‘brain drain’ while the impact of immigration flows in ACP countries is often overlooked.

B.2 Indicators for measuring impact

At present, there is no commonly accepted list of indicators on the impacts of migration on development. By building upon existing theoretical and empirical frameworks examining the migration and development nexus, the ACP Observatory suggests a set of core indicators recommended for forthcoming studies. Most indicators are measured by using existing data sources while additional indicators need data to be collected through nationally-representative household surveys and in-depth interviews with key stakeholders.

The Institute for Public Policy Research (ippr), member of the Consortium and the Academic Advisory Board of the ACP Observatory, in cooperation with the Global Development Network, developed an approach measuring the impact of international migration on development. The findings suggested that migration can influence social and economic development across eight key dimensions: economy, education, health, gender, wider social impacts, governance, environmental sustainability and disaster relief. It described various mechanisms through which impacts can occur and surveyed the possible implications of each (Chappell and Sriskandarajah, 2007). The project also considered non-economic factors impacting development in countries of origin by using a combination of different research methods for its impact analysis, including a cross-country regression analysis, a household survey roster and specific household questions.

Although there is a diversity of indicators used for measuring the impact of migration and development separately, the link between the two remains less explored. The lack of concrete and reliable evidence on the interrelationships between migration and development also limits the establishment of such indicators. Indicators such as those adopted for the monitoring the achievement of the Millennium Development Goals (MDGs) could represent a starting point in assessing the reciprocal impacts between migration and development. This could be possible by merely comparing countries with diverse migration (emigration, transit and immigration) patterns in terms of numbers and profiles of migrants.

Preliminary assessments on existing research gaps, conducted by the ACP Observatory in collaboration with national counterparts in the 12 target countries and 6 ACP regions, revealed the need for information on the impacts of South-South migration on development. For this reason, the existing ippr impacts inventory will be used and developed further as the basis for the list of indicators to be developed by the ACP Observatory and which is expected to be included as a statistical annex for the studies to be conducted. Some concrete examples can include the following types of impacts and indicators:

- Impacts on health, education, poverty alleviation and empowerment of individuals;
- External shocks, such as food and energy crises as well as environmental disasters;
- Economic indicators such as the ones measuring the impact on capital markets, on sectors such as tourism, trade and investments;

- Social impact indicators with regard to the effects on children, the elderly and other family members staying behind, but also social effects on migrants and their family members in the host country;
- Knowledge transfer by highly skilled and return migrants;
- Governance indicators, e.g. the number of civil society associations and non-governmental organizations active in the country and directed and/or funded by immigrants or emigrants; number, nature and costs of actions undertaken for the benefits of the community;
- Advocacy in countries of origin and destination by diasporas, diaspora volunteering impacting on medical care, teaching, training and relief work;
- The influence of diaspora philanthropists on reconstruction in the aftermath of conflicts or natural disasters (Newland, 2010; Puentes et al., 2010).

Additional indicators can focus on human rights, forced migration, trafficking in persons and smuggling of migrants and additional impacts of diaspora engagement (Newland, 2010; Puentes et al., 2010).

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PART C – EXAMPLES OF GOOD RESEARCH PRACTICES BY THEME ⁷

Introduction

Through the commissioning and conducting of new studies, the ACP Observatory in collaboration with national and regional scholars aims at covering a broad range of research needs in the 12 target countries and 6 ACP regions. Selected researcher and research teams to undertake the studies will need to propose and elaborate the research methodologies in more detail, taking into account the unique characteristic present in each country and adapting existing tools, such as questionnaires to the specific context to be examined.

Part C provides concrete examples of good research practices by theme and useful references for further information and guidance. The aim of this section is to illustrate successful methodological approaches on a specific theme. It does not intend to replace a thorough literature review and a clear conceptualization of the study to be carried out by the selected candidate but rather serves as a tool to consult first-hand practical experiences on relevant South-South migration issues which could inspire research partners when developing and elaborating their research proposals. It is also aimed at the general academic public in ACP and EU countries wishing to base their approaches on existing methods in other countries.

Focusing on the priority research areas identified at national and regional level for the research work of the ACP Observatory, each thematic section aims at providing:

- 1) Indications on how to identify and to approach/access the target population;
- 2) Suggestions for the development and implementation of research methods;
- 3) Useful links to already existing research manuals/guides and research project reports on the respective theme;
- 4) One or more concrete examples of successful research project(s) carried out by different development agencies or research institutes.

The research themes included in this section are:

1. Impact of South-South Migration on Human Development;
2. South-South Remittances;

⁷ The concept of “good practices” is understood here according to the definition provided by the European Commission’s Web Site on Integration: “strategies, approaches and/or activities that have been shown through research and evaluation to be effective, efficient, sustainable and/or transferable, and to reliably lead to a desired result” [Source: European Commission, “European Website on Integration: What are ‘good practices?’”. <http://ec.europa.eu/ewsi/en/practice/more.cfm>].

3. Diasporas in ACP countries;
4. South-South Labour Migration;
5. Trafficking in Persons in and from ACP countries;
6. Migration and Health;
7. Migration and Environment.

All topics are approached from a South-South angle and aim to shed light on the interrelations between migration and development, with a particular focus on ACP countries.

C.1 The Impact of South – South Migration on Human Development

Target population

This research topic is rather broad and can involve different thematic areas and target groups. The focus can be on diasporas living abroad impacting on national development through the transfer of remittances and knowledge, or on households of migrants living at home using remittances for survival (or investment), on local communities and their perception and attitudes towards returnees, etc.

Suggestions for research methods

It is an arduous task to assess the impact of migration on development in a precise and comprehensive manner. So far, the Migration and Development (M&D) nexus has been evaluated mainly through remittances surveys (i.e. the impact of remittances on the national economy of migrants' country of origin), indicating the number of households relying on remittances for survival (i.e. poverty alleviation), the impact on recipient versus non-recipient households and/or the use of remittance for new investments in the home country⁸. Other economic impacts of migration may include changes i) in the distribution of welfare/inequalities, ii) in the national labour market structure, iii) of trade patterns with migrant's destination countries, and iv) foreign exchange and fiscal balance (ippr and GDN, 2010).

The measurement of the impact of migration on development becomes even more complex when considering non-materialistic benefits of migration e.g. transfer of human capital/knowledge and technology can transform national means of productions; the engagement of overseas communities in the political scenario can have repercussions on national governance; experiences abroad by returnees may impact on socio-cultural behaviour in their home community; public perception of foreign labour force and/or discrimination/xenophobia, etc.

Given the complexity of this study area, the triangulation of different research tools can presumably reveal additional insights, confirm (or not) different research findings and, thus, produce more reliable results.

⁸ However, measuring the economic impact of nationals living abroad is much more complex as it would require a comparison between the current development of a country/place of origin and a "hypothetic" development during the same time period without the absence of these migrants. Such a comparison implies assumptions which need to be taken into consideration various other external factors and, thus, makes the evaluation of the impact of migration particularly difficult.

Example: measuring the impact of migration on development

A holistic approach was adopted by the research project *Development on the Move: Measuring and Optimizing the Economic and Social Impacts of Migration* carried out by the Institute for Public Policy Research (ippr) in partnership with the Global Development Network (GDN). The project creates new methodologies for assessing migration's impacts by collecting evidence on these impacts. Besides building research capacity on migration and development issues, it suggests policy options for improving migration's contribution to development. It gathered comparable data on the wide range of developmental impacts of migration (both economic and social) thus presenting a new framework for mapping these impacts. Data was gathered on existing evidence on this diverse range of impacts and complemented with two additional kinds of new data – information collected from stakeholder interviews and nationally-representative household surveys.

The project suggests that migration can influence social and economic development in eight dimensions: economic impacts, educational impacts, health impacts, gender impacts, wider social impacts, governance impacts, environmental sustainability and disaster relief. It suggests various mechanisms through which impacts can occur and surveys the possible implications of each (Chappell, 2007).

The project tried to look also at non-economic factors impacting development in countries of origin adopting a combination of different research methods for its impact analysis, including a cross country regression analysis, a household survey roster and specific household questions. The table 1 below illustrates the potential impacts of migration on development as assumed by this model.

Table 1: The development impacts of migration

Type of impact	How impact may occur	Likely relationship
Material poverty of migrant	Migrant's income	Migration may improve wages.
Material poverty of household*	Short-term household income	Household loses the labour/income of their migrant in the home country, but may receive remittances from abroad.
	Long-term household income	Improved investment potential of household.
Household risk	Household savings	Propensity and/or ability to save may improve. Remittances may smooth domestic economic shocks.
	Diversification	Ability to reduce their risk through diversification (e.g. moving to another labour market).
Economic growth	Multiplier effects	Remittances and extra income from migration may increase volume of money spent in home economy.
	Savings	If migrants and households save more, overall savings rate may increase.
	Investment	If migrants and households invest more, overall investment may increase. Foreign investment inflows may rise.
	Output	Remittances and extra income from migration may increase propensity and/or ability to consume and produce, thus potentially increasing overall output.
	Innovation	Increased technology transfer from migrants abroad and exposure to new working practices.
	Structural change	Migration may promote 'capitalist' economic activity (e.g. move from subsistence to cash economy) or urbanisation.
Inequality	Household income	Some households may gain in short and long term from migration, changing relative income distribution across economy.
Financial system	State of financial system	Increased volume of remittances and other financial flows may help strengthen financial institutions.
	Financial inclusion	Remittances and other flows may increase financial service provision to marginal areas and increase household involvement in financial system.
Demography	Fertility rates	Migration may affect fertility rates, either by separating couples across international boundaries, or by altering the incentives of those who might have children.
	Population changes	Large-scale emigration may deplete some regions of population, undermining economic viability.
Labour markets	Household labour supply	Migration may reduce labour supply available for income earning or non-income earning tasks.
	Unemployment	Migration of excess labour may reduce unemployment or may heighten labour shortages. Return migrants may increase labour supply.
	Skilled labour supply	'Brain drain' could lead to acute shortages in some sectors but opportunity to migrate may increase investment in education, increasing long-term skill supply.
	Labour market structure	Migration may change the industrial structure or alter the split between public and private sector employment.
	Domestic wages	Wages of workers left behind may go up or down, depending on relative changes in labour demand/supply.

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	Type of impact	How impact may occur	Likely relationship
E C O N O M I C		Labour force participation	Incentives for remaining household members to participate in the labour force may change.
	Inflation	Domestic inflation rates	Remittance-fuelled expenditure may fuel inflation, especially in some sectors.
	Trade	Trade volume and direction	Migration may promote greater preferences for imported goods. Migrants abroad may increase trade links. Returned migrants may increase export production.
	Foreign exchange	Foreign exchange position	Remittances may affect the supply of foreign exchange.
	Fiscal balance	Tax take	Taxable base of labour in the economy may rise or fall.
		Social rate of return	Migration may affect the returns which the state drives from public investment (e.g. in education).
	'Dependency'	Household behaviour	Support from migrants abroad may reduce incentive to engage in economic activity or invest productively.
		State development policy	Migration may affect a government's incentives to develop the domestic economy.
	Migrant's education	Level of education of migrant	Opportunity to migrate may increase investment in education. Resources from migration may increase access to education.
	E D U C A T I O N	Household education	Educational achievement of household members
Provision and quality of education		State education policy	The possibility for its citizens to migrate may change the incentives of the government to invest in education.
		Private education provision	Opportunity to migrate, remittances and diaspora investment may fuel private sector education provision.
		Availability of teachers	'Brain drain' of teachers may hamper education system but returning migrants may have new skills and qualifications.
		Quality of education	Need to train to overseas standards may improve quality of education. Migrants and returnees may introduce new practices.
H E A L T H	Migrant's health	Migrant health profile	Moving location may expose the migrant to different health risk factors and healthcare availability.
	Household health	Household health profile	Migration may affect the ability and/or incentive of households to invest in health.
	Public health	Disease prevalence	Population movement may be accompanied by increased disease transmission.
		Health behaviour	Migration may spread health related knowledge and good practices.
	Provision and quality of health services	State health policy	Migration (e.g. 'brain drain' from state sector overseas and into private sector) may undermine public healthcare provision.

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	Type of impact	How impact may occur	Likely relationship
H E A L T H	Provision and quality of health services	Private healthcare provision	Opportunity to migrate, remittances and diaspora investment may fuel private sector health provision.
		Availability of health workers	'Brain drain' of health workers may hamper health system but returning migrants may have new skills and qualifications.
		Quality of healthcare	Need to train to overseas standards may improve standards. Migrants and returnees may introduce new practices.
G E N D E R	Impacts on female migrants	Income of migrant women	Migration may result in new employment opportunities and increased wages.
		Economic empowerment of migrant women	Migration may impact on the economic empowerment of women by altering their resources (financial and/or personal) as well as their expectations.
		Education of migrant women	Migration may impact on educational attainment by affecting either the physical and/or financial constraints to education.
		Migrant women's view of their own role	Migration may alter the migrant woman's view of her role by exposure to other ideas of gender roles, or through her own experiences gained through migration.
	Gender roles in household	Sexual division of labour	Opportunities to migrate and resources from migration may affect the sexual division of labour in a household, both by absence of particular members and by changing views of gender-based roles.
Women's status in society	Gender roles	Migration may alter the views of wider society of the role of women, either through the effects that migration might have on household relationships, or through the role that diaspora and returnees play in campaigns that affect women's opportunities.	
S O C I E T A L	Traditional culture and norms	Changing values	Migrant's values may change, and their return or diaspora activities may alter traditional culture and norms.
	Family structures and social networks	Changing family structures and social networks	Migration may impact on traditional social networks, by altering both the actual composition of groups and networks and by altering the power which each member holds. Prevalence of 'broken' households may lead to new social problems.
G O V E R N A N C E	Confidence in home society	Citizens' confidence in their own society	Opportunities to migrate may affect the degree to which people are happy with and confident in their own society.
	State capacity	Availability of key personnel	'Brain drain' may deplete staff to perform key functions of the state – not just healthcare and teaching, but to perform audits, or lead public prosecutions, for example.
	Governance standards	Demands for better governance	Migrants abroad and returned migrants may demand better standards, and diffuse good practice.
	Balance of power	Relative power of groups within society	Some domestic groups (e.g. regional or ethnic) may enjoy greater economic and even political power as a result of a greater propensity to migrate, and diaspora sections may exert power from abroad.
	Personal security	Criminality	Lack of opportunity to migrate among some groups may create resentment. Migration may fuel smuggling networks. Forcibly returned criminals may increase crime.

	Type of impact	How impact may occur	Likely relationship
E N V I R O N M E N T	Individual environmental behaviour	Environmental protection	Migrants abroad and returned migrants may increase awareness of environmental challenges and good behaviour.
	State environmental policy	Importance of environment	Migrants may place greater pressure on states to act on environmental sustainability. Emigration of people from environmentally unsustainable regions may ease pressure on states to mitigate degradation.
	Environmental technologies	Impact on environment-affecting technologies	Migrants may spread technologies which affect the environment in either positive or negative ways (e.g. new, imported production techniques could cause more or less pollution).
R E L I E F	Disaster relief	Diaspora support	Migrants abroad may assist at times of crises through increased remittances or aid. Availability of diaspora relief may reduce incentives of state or other non-state actors to intervene.

* Households referred to in this table are generally those that are directly affected by migration (that is, that send migrants, contain returned migrants or receive remittances).

Source: GDN and ippr, 2007.

Useful links

Guidelines

L. Chappell and D. Sriskandarajah, 2007. *Mapping the Development Impacts of Migration, Development on the Move: Working Paper 1*. ippr-GDN, London.

<http://www.gdnet.org/CMS/getFile.php?id=Impactmap.pdf>

Good practices

The Development Research Centre (DRC) on Migration, Globalization and Poverty, established in June 2003, has been focusing on what migration means for development and poverty reduction, rather than asking whether more development might result in less (or more) migration.

http://www.migrationdrc.org/publications/misc/Making_Migration_Work_for_Development.pdf

ippr and GDN, 2010. *Development on the Move: Measuring and Optimizing Migration's Development Impacts – Country summaries for Colombia, Fiji, Georgia, Ghana, Jamaica, Macedonia and Vietnam*, ippr-GDN, London.

<http://www.ippr.org.uk/research/teams/project.asp?id=2326>

C.2 South-South Remittances

Target population

The term remittances commonly refer to monetary transfers made by migrants or to financial flows associated with migration. However, a more broad definition also includes in-kind personal transfers and donations, and more recently the concept of social remittances referring to the transfer of ideas, behaviours and social capital, has been introduced (see Part A for the definition recommended for studies to be carried out on behalf of the ACP Observatory).

Remittances studies can focus on domestic remittances within a certain country or on international transfers from more developed to less developed countries within the same region or from overseas. In both cases, studies can either interview directly migrants sending remittances themselves, target migrants associations/communities or instead gather information by approaching the household in the country/place of origin receiving migrants' transfers.

When identifying the target population for remittances studies, it is important to bear in mind that a large part of transfers take place through informal channels and, thus, are not recorded in the registers of commercial banks, money transfer organizations (MTOs), post services, credit unions, microfinance institutions (MFIs), etc. Informal agents such as migrants returning temporarily back home, letter couriers, border agents to mention a few, represent another possible target population to analyse remittances flows between sending and receiving country/place. For migrants living abroad with irregular status, informal channels often represent the only means to send remittances back home.

Suggestions for research methods

Studies on remittances can aim at estimating the amount of remittances sent by migrants, identify the main transfer mechanisms/channels used and related characteristics (such as costs and duration), focus on the usage patterns of remittances in the receiving country (i.e. consumption, savings, investment, schooling ...), or analyse the development impact of remittances in the country of origin and/or destination as well as on migrants themselves. The most common way to gather information on remittances is the use of ad-hoc surveys and/or the inclusions of questions on remittances in existing household or labour force surveys. Interviews and focus group discussion with key informants can provide additional insights on more qualitative aspects (e.g. obstacles and constraints faced when remitting) and might be particularly suitable for assessing informal remittances flows. Whatever methodological approach is used, studies on remittances should aim at providing useful indications on how to improve remittance services to migrants and on how to enhance the development impact of

remittances. In other words, a remittances study should potentially feed into a better use of remittances by being coupled, for instance, with job, housing or investment generating activities.

Examples: measuring impact of remittances on development

A good example on how to conduct a survey measuring the impact of remittances on the development of migrants' country of origin is the study conducted by IOM in Angola. Based on a previous study on remittances flows between Serbia and Switzerland, the research methodology was adapted to the specific context of the target countries (i.e. Angola, Portugal and South Africa) allowing data collection in several migrant-sending areas of Angola as well as main hubs of Angolan communities in Portugal and South Africa. The study used different research methods including a desk review and a household survey in Angola and individual interviews with Angolans living abroad (IOM, 2009a). The household survey adopted random sampling, including households with a migrant relative; while interviewees in the two destination countries were selected according to if remittances were sent during the previous twelve months. Two questionnaires were developed: one to be used with remittances sending migrants residing in host countries and one for households receiving remittances in the origin country. The table 2 below summarizes the questions utilized for the remittances part in the households' survey questionnaire. Furthermore, two focus group discussions (FGD) allowed to obtain additional insights and to compare results with those from the household survey.

Table 2: Household-Level Survey Tool - Remittances Receivers: questions in Part II on remittances

<ul style="list-style-type: none">▪ Do you send money to one or more relatives in your home country (HC) /country of origin (CO)?▪ <u>In the past 12 months</u>, how much money have you sent home, to whom, how often and for what purpose?▪ For how long have you been sending remittances?▪ From the moment you started sending remittances until now, have there been changes in the quantity and frequency of the remittances you send?<ul style="list-style-type: none">- If so, what sort of changes? (mark all that apply)- What is the reason(s) for this/these change(s)?▪ How do you normally send your remittances?▪ Why do you use this method/company?(mark all that apply)▪ How much time does it take for your relative to receive the money once you have sent it?▪ Do you have to pay a fee to send your remittances home?<ul style="list-style-type: none">- If yes, please give an example:

- Do you know how the money you send home is used?
 - If yes, how does the person receiving your remittance use the money?
- Who makes the decisions about how the remittances you send are spent?
- Apart from money, do you send other kinds of goods (in-kind) to your relatives in (CO)?
 - If yes, what type of goods?
- Besides sending remittances (money and/or goods), what other types of economic activities keep you connected to (CO)?
- Thinking about the future, do you hope or plan to invest any money in any of the following activities in (CO)?

- Do you have a bank account in (HC)?
 - If yes, what do you use your bank account for?
 - If not, why don't you have a bank account?
- Do you have a bank account in (CO)?
 - If yes, what do you use your (CO) bank account for?
 - If not, why don't you have a bank account in (CO)?
- Do you belong to any sort of group or organization here in (HC) for people from your home country?
 - If so, explain which one and where the group is located?
 - What does this group do?
- Has this group ever made a collective contribution /donation to a development project in your home country?
 - If so, did you participate? Please explain:
 - If you do not belong to such a group, please explain why not:
- Do you plan to stay in (HC) or do you plan to return to your country of origin? Do you plan to live in both places or go somewhere else altogether? Are there factors that will influence your decision? Please explain.

Source: Questionnaire provided by lead researcher, IOM 2009a.

Note: Pre-codified answer options were not included due to limited space available. Please see annexes 1 and 2 for full questionnaires used for households receiving remittances and migrants sending remittances.

Another example of in-depth assessment providing highlights on existing gap, strengths and opportunities in relation to remittances is the IOM-Universal Post Union (UPU)-Pan African Postal Union (PAPU) pilot project study on "Supporting an Affordable Electronic Remittances transfer System between Tanzania and Uganda" carried out in 2009. This study involved a desk

review, field interviews and stakeholder consultations in both countries. Data were not only collected on the amount of funds transferred between Uganda and Tanzania and the mechanism used to transfer these amounts, but also included views on policy, legislations and institutional arrangements which could promote a more efficient remittances system. The findings of this study allowed to better understand required operational improvements following the installation of the International Financial System (FIS) aiming at improving the transfers of remittances through Ports Offices in Tanzania and Uganda (for details see link at the end of this section).

Similar to the IOM-UPU-PAPU project, each remittances study carried out in ACP countries should aim at producing concrete inputs for policy-makers and migration practitioners. Recommendations for more action-oriented research relevant for policy making are provided by Manuel Orozco in table 3 below.

Table 3: Policy and Research Questions for the analysis of Worker Remittances

Policy issues	Policy Problem	Policy questions	Research questions
Marketplace for Money Transfers			
1. Improve competition, reduce cost and informality;	Cost of remitting & informality	How can players maximize their competitive advantages & reduce informality? What instruments exist to motivate cost reduction?	What is the relationship between MTOs, payers, informal networks, regulatory environment and affordable remittance transfers? Is remittance literacy an effective tool to mitigate costs? What indicators are appropriate to measure its impact?
2. Tax breaks or incentives to import devices for money transfers	High taxes on IT	Can tax incentives motivate competition and modernize payments?	What are the cost/benefit ratios in adopting new technologies?
Asset building			
3. Alternative payment instruments, such as debit cards or mobile banking;	Outdated IT	What is the tradeoff between current and new payment instruments?	Can a development impact be measured from introducing mobile banking and card based transfers?
4. Accelerating financial access through credit unions and MFIs;	Poor participation	What can alternative FIs do to improve their intermediation goals and strategies?	What is the current performance of MFIs in remittance transfers? What challenges do they face? What salient factors and criteria exist to look at best practices?
5. Engaging banking institutions to provide broad financial services (payments, savings, credit, risk mitigation)	Low banking access	What incentives are needed to bring banks to serve recipients? Should there be standards and goals of 'bankarization'?	What are the constraining factors preventing banks from offering services? What measures of financial access are needed? What conditions are needed for FIs to capitalize from remittance transfers?
6. Supporting investment projects related to remittances or remitters	Low investment	Can the private sector leverage remittances to promote investment? How can MFIs design investment projects leveraged from remittance transfers or earnings?	Is there a correspondence between the productive base of the local economy and migration? Is there a correspondence with remittance expenditures? What stimuli factors can foster entrepreneurialism among remittance senders and recipients? What would be the effect of supporting real state investment among transnational families?
7. Designing products that include education and health services	Low education and health	What resources do financial institutions need to introduce alternative services?	What would the market be for health and education services provided by FIs? What indicators would suggest effective performance of such health and education products?
Government policies			
8. Engage governments to review their role as environment enablers.	No clear vision No outlook	How can governments adopt a policy agenda associated to remittances and its diaspora?	
Macroeconomic policies: if there is time we could tackle these specific questions			
9. Macroeconomics of remittances	Uncertain knowledge	What are the long term projections on remittances? What is the remittance impact on growth?	What is the ratio of return migration, and duration living abroad? What is the appropriate methodology to measure impact on growth? In what manner (and what evidence supports it) remittances constitute a mitigating factor of growth?
10. Poverty reduction, income distribution and gender	Unspecified	What is the effect of remittances on poverty reduction and income distribution? Do gender differences matter?	Are there predictors of poverty reduction and income distribution associated to remittances? What are the long term prospects? Are there gender differences associated to the development impact of remittances?
11. Financial system and remittances	Unclear policy linkages	In what way remittances influence the financial sector and the local economy? What policy tools can be adopted to interact with these flows?	What is the impact of remittance flows on job creation, productivity, local currency appreciation, prices? How can the multiplying effects of remittances be measured across small and large economies? Are gross domestic savings positively influenced by remittance flows?
12. Measuring diaspora economic flows	Neglect	What are the various impacts of migrants' economic links with the homeland?	Are there other flows than remittances? How can they be measured and what impact do they exhibit? What methodologies, if any, should Central Banks adopt to measure migrants' economic links?

Source: Manuel Orozco, *Political Economy of International Migrant Worker Remittances*, in *The Money in Between*, edited by Lyenne Reiner (forthcoming).

Useful links

Guidelines

M. Orozco et al., 2005. *Transnational Engagement, Remittances, and their Relationship to Development in Latin America and the Caribbean*. Institute for the Study of International Migration, Georgetown University. This study identifies family remittances within enduring core ties (so-called “5Ts”) between migrants and their country of origin impacting development.

http://isim.georgetown.edu/publications/20050701_Rockefeller_Report.pdf

Good practices

Angola: A Study of the Impact of Remittances from Portugal and South Africa. Prepared by S.P. Alvarez Tinajero, MRS No. 39, IOM, Geneva, 2009

http://publications.iom.int/bookstore/index.php?main_page=product_info&products_id=567

IOM's survey of banks' and financial institutions' approach to facilitate women migrants' remittances and investments, prepared by S.P. Alvarez Tinajero, is another good example of remittances studies. In this case, the research methodology consisted in different face-to-face interviews with representatives of ministries, government agencies, bank and non-bank-financial institutions, money transfer operators/MTOs, postal offices and civil society organizations in Italy and seven countries in West and Central Africa.

Southern African Migration Project (SAMP), 2006. *Migration, Remittances and Development in Southern Africa*, Migration Policy Series No. 44. To generate nationally representative data on migrant remittances at the household level within the SADC, SAMP devised and implemented the so-called Migration and Remittances Survey (MARS) method. Relying on two sets of data (household and individual data), the main objectives are: (a) to collect data on migration and remittance patterns; (b) understand the methods used for transferring remittances in both cash and goods; (c) assess the importance of remittances on the migrant sending households' economy; and (d) examine the impact of migration on the migrant sending households and the communities where they are located.

<http://www.queensu.ca/samp/sampresources/samppublications/policyseries/Acrobat44.pdf>

See also SAMP, Migration Policy Series No. 49 and No. 51 for further info on the MARS method:

<http://www.queensu.ca/samp/sampresources/samppublications/policyseries/Acrobat49.pdf>

<http://www.queensu.ca/samp/sampresources/samppublications/policyseries/Acrobat51.pdf>

Supporting an Affordable Electronic Remittances transfer System between Tanzania and Uganda. Prepared by Pr. H. Bohela Lunogelo, IOM-UPU-PAPU, 2009

http://www.migration4development.org/sites/m4d.emakina-eu.net/files/Final_IOM-UPU_Assessment_on_Remittances_bt看_UG-TZ.pdf

Economic and Social Impacts of Remittances on Households: The Case of Pakistani Migrants Working in Saudi Arabia. Prepared by G.M. Arif, IOM, Geneva, 2010, A household survey covering 500 migrant-sending households in both rural and urban areas in nine high-migration districts not only looks at the remittances patterns but also investigates the impact of remittance flows from Pakistani migrant workers in Saudi Arabia on their families back home.

http://www.iom.int/jahia/webdav/shared/shared/mainsite/published_docs/studies_and_reports/pakistan-remittance-study.pdf

C.3 Diasporas in ACP countries

Target population

A prerequisite for any diaspora study is a clear definition of the target group. As discussed in Part A there is no general agreement on the definition of the term “diaspora”. This concept refers to transnational population groups living abroad but still maintaining more or less close relationships with their country of origin. Distinctions can be made *inter alia* on the basis of the time/period spent abroad, citizenship, place of birth, language, identity, etc. which in turn will define the specific target group a study is looking at.

Besides the collection of individual data, diaspora studies can focus on collective data such as information on associations, networks, community organization, clubs and societies, etc. providing services for diaspora members abroad or migrants’ households at home. Furthermore, gender-differentiated data are particularly relevant when studying diasporas living abroad in order to better identify different opportunities and vulnerabilities faced during each step of the migration process (IOM, 2006) .

Apart from clearly defining the target group of a specific research project, each study should try to be as much inclusive (e.g. statistically significant samples when using quantitative methods) and effective (e.g. meaningful participation for participants selected for qualitative tools) as possible in order to produce results useful for policy making.

Suggestions for research methods

Information on diasporas can be found in the country of current residence as well as in the country of origin. Combining available sources in both places seem to be the most effective and comprehensive way to assess the characteristics of diaspora members. These sources include censuses, population registers, data from consulates and embassies, etc. (IOM, 2006).

Studying diasporas and its impact on the development is particularly challenging due to a series of obstacles related to its definition, identification and sampling. Census data and immigration surveys (in destination countries) can provide a rough estimate of the size of the diasporas living within the country and their yearly in- and outflows. Unfortunately, these data sources cannot be accessed for a detailed data breakdown due to privacy protection. Thus, an ad-hoc survey of diaspora members has become the most common method to investigate overseas communities and provide insights on its characteristics, activities and linkages with the home country. These studies raise issues of representativeness as most of them are based on rather small samples or sub-groups of diaspora members due to geographically large dispersion and difficulty to identify and directly contact diaspora members (in particular members of vulnerable groups such as asylum seekers and refugees).

To overcome some of these limitations, new research initiatives have been trying to make use of social media and web-based methodologies, which are increasingly used by diaspora members to facilitate remittances transfers but also communication.

Another aspect to keep in mind when carrying out research on diasporas, is the specific characteristics of certain migration corridors i.e. migration flows between two countries. Diasporas studies require a tailored approach taking into account the nature of the diaspora, the extent of their activities, the availability of resources, partnership opportunities, etc. in place of the country of origin and destination (GFMD, 2008).

A study approach increasingly utilised for diaspora studies is the so-called Community-based Research (CBR). This methodology tries to promote the active participation of the communities under study to overcome limitations of conventional research methods developed and implemented from outside. Such an approach aims at facilitating the accessibility to the target population, at improving the authenticity and the relevance of the study results but also at reinforcing self-awareness and the capacities of the communities (Walter and Duncan Gordon Foundation, 2007).

Examples: Diasporas mapping

An innovative example utilizing social media and web-based methodologies to approach diaspora members is the study developed by the Southern African Migration Project (SAMP) entitled “Diasporas on The Web: new networks, new methodologies” which examines the African diasporas in Canada: so-called Social Networking Sites (SNSs) have become one of the main means for diaspora members to keep in contact and interact with family and friends in their country of origin. The mentioned study relies on the internet (SNSs in particular) to identify and recruit a large national sample of diasporas individuals and uses online surveying to collect information on the diasporas and its linkages with countries of origin. It developed a multi-faceted e-recruitment strategy including social media and diaspora websites such as Facebook, LinkedIn, Academia Edu, University and Professional websites (Crush J. et al., forthcoming). This methodology can be adjusted to ACP countries (although the use of social networks might be less common in ACP destination as compared to Canada).

Another example using a web-based approach is the study conducted by IOM and the Government of Zambia entitled “Online Survey on Zambians in the Diaspora” in 2010. This study serves as an entry point for government engagement with Zambians living abroad and who may be interested in participating in the development of their country of origin. It assesses *inter alia* the wishes of Zambians living abroad with the aim of informing more diaspora-friendly policies and legislation promoting indirectly the role of Zambian nationals living abroad in the national development process. The brief survey collects information on the demographics,

professional skills, available resources, interest and experiences of Zambian migrants in order to identify opportunities for individual diaspora members to share relevant up-to-date information, to improve the sharing of information between Zambia diaspora members, to strengthen existing Zambian diaspora networks and associations, etc. (for the full survey please see annex 3).

Useful links

Guidelines

Engaging Diasporas as Development Partners for Home and Destination Countries: Challenges for Policymakers. Prepared by D. Ionescu, Migration Research Series (MRS) No. 26, IOM, Geneva, 2006.

http://www.iom.int/jahia/webdav/site/myjahiasite/shared/shared/mainsite/published_docs/serial_publications/mrs26%20interior.pdf

Diaspora Engagement in Peace-Building and Development in Home and Host Countries: Toolkit for Community-Based Research (CBR) Practitioner. Prepared by B.H. Belai, Walter and Duncan Gordon Foundation, Citizenship Programme, Diaspora and Transnational Communities, Toronto, 2007.

http://www.gordonfn.org/resfiles/CBR_Tool_Final_Report.pdf

Good practices

Online Survey on Zambians in the Diaspora. IOM, Zambia, 2010. The study is part of the project Institutional Capacity-Building for Diaspora engagement in Zambia, which aims to assist the Government of the Republic of Zambia to engage and mobilize the Zambian diaspora towards national development efforts. The project supports the development of a national diaspora strategy, establishing an Office for Diaspora Affairs and, through gathering strategic information about the nature and location of the diaspora, building confidence and facilitating contacts between the diaspora and the Zambian Government.

Enhancing the development impact of migration: Developing an overseas employment and diaspora mobilization strategy in Mauritius, launched in 2006 by IOM Mauritius mobilizes the Mauritian diaspora to contribute to the country's development. The project included a rapid mapping of the location and profile of the diaspora, as well as the development of a preliminary road map to enhance the involvement and contribution of the diaspora in Mauritius development strategies. The result of the project was a comprehensive study on policy options to engage the Mauritian diaspora in the development of Mauritius.

Labour Migration Unit at the Ministry of Labour and Human Resource Development and creation of tools for assessment of dynamics of Labour Migration in Kenya and of the Kenyan diaspora implemented by IOM Nairobi in 2008 with the aims to improve the capacity of the Ministry of Labour and Human Resources Development to manage labour migration, contribute to the development of a coherent and holistic labour migration policy, and improve linkages with the diaspora. The project resulted in a report on the diaspora profiles, increased knowledge of dynamics in the UK generated from the pilot survey and recommendations made for designing an internet-based tool.

The Contribution of Diaspora Return to Post-Conflict and Fragile States, OECD, Paris, 2010. An OECD study with examples from S. Sudan, Haiti and Afghanistan, aiming at better understanding how diaspora return can effectively assist governments to perform core functions and deliver basic services in fragile and post-conflict countries.

<http://www.oecd.org/dataoecd/31/1/46663447.pdf>

A joint OECD-IOM policy brief combining the key findings of the mentioned study and lessons learned from IOM's programmes and expertise in diaspora return to fragile states can be found at: <http://www.oecd.org/dataoecd/42/6/46664322.pdf>

C.4 South-South Labour Migration

Target population

The initial step of any research study on labour migration will consist in clearly defining the notion “labour migrant”. For studies to be carried out on behalf of the ACP Observatory we recommend to utilize the UN definition “migrant worker” as indicated in Part A of this guide.

Labour migration can take place at an international or national (usually rural to urban) level, and in both cases it represents only a sub-set of the total international or national migration flows. In the case of ACP countries, labour migration can refer to internal movements towards urban centres, inflows of nationals from neighbouring countries and/or countries within the same region or from other ACP regions, as well as own nationals moving abroad to an ACP or other developing country to seek employment or occupy a remunerated activity.

Suggestions for research methods

Researching labour migration can be of a more quantitative nature when trying to assess the presence of migrants in certain economic sectors compared to the presence of citizens of the host country and/or when focusing on the type of labour activities performed by migrants (e.g. highly skilled vis-à-vis lower skilled). This type of research studies will mainly utilise survey-based methods using statistically significant samples, and allow obtaining an overall picture of the changing trends in the number and employment of foreign labour force within the national labour market. Census data also represent a useful source to assess the activity status, occupation, income, etc. (for details see UNSD, *Handbook on Measuring the Economically Active Population and related Characteristics in Population Censuses*, 2009).

More qualitative studies will, instead, focus on the work conditions of migrants at the work place such as daily working hours, insurance against accidents, amount of leave granted, and other basic labour rights. Such information is usually collected through a Labour Forces Survey (LFS), i.e. standard household-based survey of work-related statistics (publicly available LFSs are posted online by ILO: http://www.ilo.org/dyn/lfsurvey/lfsurvey.list?p_lang=en; more labour statistics and meta-data are available in ILO’s LABORSTA database).

Skills mapping exercises use both qualitative and quantitative tools. Such studies try to assess to which extent the characteristics of migrant labour force correspond to the actual skills need of the labour market in the destination country, providing useful inputs for the development of a national migration strategy.

Examples: assessing labour migration statistics

As mentioned above, the comparison of labour migration statistics is often problematic due to the different concepts and terms utilised between different countries. In view of greater regional integration, in terms of free trade areas but also free (labour) movement areas, improving the measurement and the collection of labour statistics becomes paramount. The recent *Data Assessment of Labour Migration Statistics in the SADC region: South Africa, Zambia, Zimbabwe* conducted by International Organization for Migration (IOM) in partnership with the Southern African Development Community (SADC) aimed at assessing the existing national data collection systems on international labour force within three target countries, focusing in particular on brain drain and remittances flows between these countries. The study allowed identifying main data gaps, elaborating recommendations on how the existing data could be improved and how potential data sharing mechanisms could further increase existing knowledge on labour migration patterns in this region. Table 4 below is recommended by this study for the measurement of both stocks and flows of international migrants as well as remittances, which allows deriving a number of labour migration indicators (IOM and SADC, 2009).

Table 4: Recommended tabulations for measurement of migrant stocks, flows and remittances

STOCK
<ul style="list-style-type: none"> - Resident population by age (5-year age groups), sex, country of birth (top 10 origin countries and other origin countries) - Resident population by age, sex, country of nationality - Employed persons by age, sex, country of birth/nationality: <ul style="list-style-type: none"> Industry (per ISCO standards) by age, sex, country of birth/nationality Occupation (per ISCO standards) by age, sex, country of birth/nationality - Employment status of persons by age, sex, country of birth/nationality - Number of refugees by country of origin (by age, sex, education, occupation) - Nationals abroad by sex, age and occupation/industry, educational attainment (top 10 destination countries and other destination countries) (emigrants) - Ever lived/worked abroad by sex, age, occupation (return migrants)
FLOWS (using a 12 month migration interval)
<ul style="list-style-type: none"> - Inflows of migrants (foreigners and foreign born) by age, sex, country of origin (top 10 origin countries and other origin countries) - Inflows of migrant workers (employed) by age, sex, industry, occupation (top 10 origin countries and other origin countries) - Inflows of refugees by country of origin (by age, sex, education) - Outflows of nationals by age, sex (and if possible, education/employment status/industry/occupation) by country of destination (top 10 destination countries and other destination countries)

REMITTANCES (most of this information is not available, but could be obtained via surveys)

- Total Inflow (by remittance types), by country of origin (top 10 origin countries and other origin countries)
- Total Outflow (by remittance types), by country of destination (top 10 destination countries and other destination countries)
- Average amount sent/received by households (monthly and annually)
 - Value of Money
 - Value of Goods
 - Value of Remittances In-Kind
 - Value of pensions received from other countries
- Frequency of sending
- Mode of transmission (method used most often to send)
 - Bank transfer
 - MTO (Money Transfer Organization)
 - Post office
 - Agent/courier
 - Hand carried
 - Other
- Use of remittances (money) (template)
 - Used to buy food and/or clothing for family
 - Buy other household goods
 - Pay for schooling/vocational training of household member
 - Pay off medical bills
 - Pay off debts
 - Pay for wedding, funeral, or other social function
 - Pay for visit abroad (travel)
 - Buy land
 - Rent more land
 - Improve land
 - Buy farm inputs/implements
 - Invest in non-farm business
 - Other financial investment
 - Buy/improve house/Home construction
 - Save money (bank or post office savings)
 - Other

POSSIBLE INDICATORS DERIVED FROM TABLES

- % of population who are migrants
- % of workforce who are migrants (by industry or occupation)
- % of migrants who are in workforce
- % of migrants who were asylum seekers/refugees
- Annual Immigration rate
- Annual Outmigration rate
- Annual Net Migration rate
- % of total migrants (stock) entered during past year
- % of emigrants with college degree
- Average amount of remittance receipt (for households receiving remittances)
- Average amount of remittances sent (for households sending remittances)
- % using remittance to fulfil basic needs (food, clothing, housing)

Source: IOM and SADC, 2009.

Other good research examples on labour migration are studies carried out by the European Migration Network (EMN), a pilot project launched by the European Commission (EC) in 2003, aiming at providing up-to-date, objective, reliable and comparable information on migration and asylum, with a view to supporting policy making in the European Union in these areas. Similar to the ACP Observatory, the EMN conducts studies in several target countries following a common methodology (including a glossary) to make results comparable and to allow cross-country analysis. For instance, the EMN study entitled “Satisfying Labour Demand through Migration in the European Union” is particularly relevant to the EU policy context, considering the EU’s aging population. Based on the results of 15 national reports, it allows for a first overview of whether and how migration is used to address labour demand. Although concepts vary between Member States, creating some difficulties in ensuring comparability of statistical data, the key definitions are used consistently (highly-skilled, low-skilled, seasonal workers...) throughout all national studies. Main data sources for all national reports are labour force surveys usually allowing distinction by nationality and qualification (occupation and skill level estimated through the educational level). To include also information on seasonal workers or obtain additional breakdown of information various additional sources are used (e.g. the AGDREF application producing residence permits in France, social security data in Austria, etc. For more details on studies carried out by the EMN (see <http://emn.intrasoft-intl.com/html/index.html>).

Useful links

Guidelines

The ILO working paper 30/2007, *Directions for national and international data collection on forced labour*, provides some ideas and directions as to how the existing gaps in our understanding of the quantitative dimensions of forced labour could be reduced.

http://www.ilo.org/wcmsp5/groups/public/---ed_norm/---declaration/documents/publication/wcms_081986.pdf

The OSCE-IOM-ILO *Handbook on Establishing Effective Labour Migration Policies in Countries of Origin and Destination* aims to assist States in their efforts to develop new policy approaches, solutions and practical measures for better management of labour migration in countries of origin and of destination. IOM and OSCE are currently developing Generic Training Modules linked to the Handbook, including adapted versions for the sub-Saharan African and Latin American context.

http://www.osce.org/publications/eea/2006/05/19187_620_en.pdf

United Nations Statistical Division (UNSD) *Handbook on Measuring the Economically Active Population and related Characteristics in Population Censuses*, 2009.

http://unstats.un.org/unsd/demographic/sources/census/Final_draft%20ESA_STAT_SER.F102.pdf

Good practices

Data Assessment of Labour Migration Statistics in the SADC Region: South Africa, Zambia, Zimbabwe. IOM and SADC, 2009.

http://iom.org.za/site/index.php?option=com_docman&task=doc_view&gid=155

C.5 Trafficking in Persons in and from ACP countries

Target population

When doing research on Trafficking in Persons (TiP), there are different types of data can be collected: for example, information on trafficked persons, traffickers, the trafficking process, the criminal justice response to TiP, the types of assistance provided and the legal framework, among others (IOM and BMI, 2009). This section provides an example of how to collect data on trafficked persons - however, it remains essential to triangulate these data with information on the other categories mentioned above (references for examples are included at the end of this section).

Access to trafficked persons is usually difficult due a number of different factors. The control strategies used by traffickers and exploiters, including threats to family members, may mean that trafficked persons are unwilling to participate in research, while they are in destination countries. The fear of reprisals is likely to continue when they return to their country of origin. This obviously affects what and how much the contacted persons are willing to tell (Surtees & Craggs, 2010; IOM, Internal Research Guidelines). In addition, trafficked persons may not know that they are victims of trafficking or may not want to be considered as such. Furthermore, trafficked persons might be stigmatized by their community upon return back home and, thus, further dissuade a trafficked person to report its case (see also Laczko and Danailova-Trainor, 2009).

In addition to current or previous trafficked persons, there are a number of 'key informers' who represent an important source of information and therefore a frequent interview target group- these include, for example, government officials from ministries or offices dealing with migrants, service providers, health practitioners and others (IOM, Internal Research Guidelines).

Suggestions for research methods (involving trafficked persons)

The main instruments to collect data on trafficked persons are self-administered survey tools to obtain an indication of the size and main characteristics of the phenomenon, or instead more qualitative semi-structured face-to-face interviews. In-depth interviews are the more appropriate method if the research allows for reliance on fewer respondents and asks for detailed information (for other approaches see Surtees and Craggs, 2010, and Brunovkis and Surtees, 2010).

By conducting interviews, experiences of trafficked persons can be explored in depth rather than through short and often incomplete answers collected by questionnaires. In addition, interviews are much more personal and, thus, allow the discussion of more sensitive issues. However, face-to-face interviews require establishing trust between interviewer and interviewee which might necessitate particular patience and time. Furthermore, informed

consent and the respect of other ethical principles are paramount when interviewing trafficked persons (for details see, for instance, *WHO ethical and safety recommendations for interviewing trafficked women*, Zimmerman, C. and C. Watts, London School of Hygiene & Tropical Medicine and World Health Organization, 2003; *The IOM Handbook on Direct Assistance for Victims of Human Trafficking*, IOM, Geneva, 2007; *Guidelines for the collection of data on trafficking in human beings, including comparable indicators*, IOM-BMI, Vienna, 2009).

Collecting information with trafficked persons requires more attention than simply reading questions from a questionnaire. The interviewer may encourage the respondent to share its experience guaranteeing the complete confidentiality of the information collected (IOM, Internal Research Guidelines).

Another important aspect to keep in mind when researching the topic of Trafficking in Human Beings is its linkages with Human Development. Poverty is often regarded as the “root cause” of trafficking, but the linkages between poverty, a lack of development and trafficking are complex. In some cases, indeed, being trafficked abroad might represent the better option for a person than remaining in the country of origin or transit. Thus, data on poverty and additional socio-economic indicators should be gathered as well and triangulated where possible with other collected information. Such an approach goes beyond simple reporting of TiP cases and produces more policy-oriented findings (for more info, see Laczko and Danailova-Trainor, 2009).

Example (collecting trafficked person-centred data)

The *Guidelines for the Collection of Data on Trafficking in Human Beings, including Comparable Indicators*, elaborated by the International Organization for Migration (IOM) and Federal Ministry of the Interior of Austria (BMI) suggest collecting information on the number of persons who were officially identified and registered as victim of trafficking, i.e. victims of TiP assisted, but also those to whom assistance was refused, those who declined assistance and those who disappeared. This model is based upon the approach adopted by IOM. The table 5 includes indicators suggested for collecting core information on victims of Trafficking in Persons.

Table 5: Template for data collection on Victims of Trafficking in Persons

Information (indicators) to be collected	Answers
Gender	Male/Female/Transgender/Not known
Nationality	Country ¹⁰⁷
Country of Birth	Country
Age of first contact with the recruiter	In months and years
Country of recruitment	Country
Type of recruitment	Kidnapping/Sold by member of family/Sold by non-family member/Adoption/Educational opportunity offered or expected/Family visit offered or expected/Friend visit offered or expected/Labour opportunity offered or expected /Marriage offered or expected/Tourism/Other/Not available/Not Known
Relationship to recruiter	Family/Relative/Acquaintance/Friend/ Stranger/Not available/Not known
National borders crossed	No national borders crossed/National borders crossed/Not available/Not known
Forms of border crossing	With legal documents/With false documents/With the assistance of a third person/Illegally/Not available/Not Known
Country(ies) of exploitation	Country
Age when exploitation started	In months and years
Legal status in place of exploitation	Regular/Irregular/Not available/Not known
Type of exploitation	Sexual exploitation/Forced labour (Agricultural work/Begging/Child care/Construction/Domestic work/Factory work/Fishing/Mining/Restaurants and hotel work/Small street commerce/Trade/Other)/Low level criminal activities/Forced military service/Forced marriage/Organ removal/Other/Not available/Not Known
Type of assistance given to the victim ¹⁰⁸	Medical assistance/Psychological assistance/ Legal assistance/Shelter/Travel assistance/Reception assistance/Reintegration assistance/Resettlement assistance/Integration assistance in destination country/Psychosocial assistance/Other/Not available/Not Known ¹⁰⁹
Cooperation of victim with law enforcement	Yes/No/Not available/Not known
Cooperation of victim with judicial officials	Yes/No/Not available/Not known
Re-trafficked victim	Yes/No/Not available/Not known

¹⁰⁷ For a list of countries, please refer to the International Organization for Standardization (2008): *List of English country names and codes elements*.

¹⁰⁸ For further information see International Organization for Migration (2007): *The IOM Handbook on Direct Assistance for Victims of Trafficking*, Geneva.

¹⁰⁹ For information on the health consequences of trafficking in persons, including specific actions for health providers, see IOM, London School for Hygiene and Tropical Medicine and UN.GIFT (2009): *Caring for Trafficked Persons: Guidance for Health Providers*.

Source: IOM and BMI, 2009.

Note: Many ACP countries do not yet have explicit legislation on trafficking, thus, the information requested in relation to law enforcement might not be applicable.

Example (analysing trafficked person-centred data)

The most advance example of comprehensive data collection on Victims in TiP is represented by IOM's Counter-Trafficking Module (CTM), known also as the IOM human trafficking database. It is the largest transnational database containing only primary data on victims of trafficking (VoT). It was developed and implemented by the IOM mission in Pristina and its usage has since increased to include all regions of the world. The structure follows the format of two accompanying IOM VoT questionnaires used by IOM missions and partner organizations involved in direct assistance. The IOM Screening Interview Form is an institution-wide form intended to assess whether the individual is a victim of trafficking and thus eligible for an IOM assistance project; and the Assistance Interview Form aims to track the nature of direct assistance given, as well as documenting further details of the trafficking experience (for details see IOM, 2007a). The database now operates in 72 IOM missions globally, although usage of the tool varies from mission to mission. Although not every IOM mission is able to use the IOM human trafficking database, additional data from non-users have been integrated to increase accuracy and completeness of all IOM-assisted VoT cases. While the system was initially designed as a case-management tool for IOM counter-trafficking direct-assistance programmes, it has since demonstrated its added value to research. The information collected in the tool needs, however, to be duly contextualized to avoid misinterpretation of the figures (for more information see Surtees & Craggs, 2010; VoT map commentary included in IOM, 2010).

Useful links

Guidelines

Recommended Principles and Guidelines on Human Rights and Human Trafficking, Report of the United Nations High Commissioner for Human Rights to the Economic and Social Council, E/2002/68/Add.1, New York, 2002.

[http://www.unhcr.ch/Huridocda/Huridoca.nsf/0/caf3deb2b05d4f35c1256bf30051a003/\\$FILE/N0240168.pdf](http://www.unhcr.ch/Huridocda/Huridoca.nsf/0/caf3deb2b05d4f35c1256bf30051a003/$FILE/N0240168.pdf)

Guidelines for the collection of data on trafficking in human beings, including comparable indicators. IOM-BMI, Vienna, 2009.

<http://www.iomvienna.at/images/stories/Guidelines%20for%20the%20Collection%20of%20Data%20on%20Trafficking%20in%20Human%20Beings.pdf>

The IOM Handbook on Direct Assistance for Victims of Human Trafficking. IOM, Geneva, 2007.

http://www.iom.int/jahia/webdav/site/myjahiasite/shared/shared/mainsite/published_docs/books/CT%20handbook.pdf

WHO ethical and safety recommendations for interviewing trafficked women, prepared by Zimmerman, C. and C. Watts, London School of Hygiene & Tropical Medicine and World Health Organization, 2003.

<http://www.who.int/gender/documents/en/final%20recommendations%2023%20oct.pdf>

Beneath the Surface: Methodological Issues in Research and Data Collection with Assisted Trafficking Victims. Prepared by R. Surtees and S. Craggs, IOM-NEXUS Institute, Human Trafficking Research Series, Geneva 2011.

Human trafficking and forced labour exploitation - guidance for legislation and law enforcement, ILO, Geneva, 2005.

http://www.ilo.org/wcmsp5/groups/public/---ed_norm/---declaration/documents/publication/wcms_081999.pdf

Untold Stories: Biases and Selection Effects in Research with Victims of Trafficking for Sexual Exploitation. Prepared by A. Brunovskis and R. Surtees; a paper outlining and exemplifying some of the methodological and ethical issues to be considered and accommodated when conducting research with trafficked persons in *International Migration, Special Issue on Human Trafficking*, Volume 48, Issue 4, August 2010.

<http://onlinelibrary.wiley.com/doi/10.1111/j.1468-2435.2010.00628.x/full>

Trafficking in Persons and Development: Towards Greater Policy Coherence, prepared by G. Danailova-Trainor and F. Laczko; a paper outlining a possible framework for a more evidence-based approach to understanding the linkages between trafficking, trafficking policy and human development; in *International Migration, Special Issue on Human Trafficking*, Volume 48, Issue 4, August 2010.

<http://onlinelibrary.wiley.com/doi/10.1111/j.1468-2435.2010.00625.x/pdf>

ASEAN and Trafficking in Persons: Using Data as a Tool to Combat Trafficking in Persons. IOM, Geneva, 2007.

http://www.iom.int/jahia/webdav/site/myjahiasite/shared/shared/mainsite/published_docs/books/lowres%20asean%20report-complete.pdf

Data and Research on Human Trafficking: A Global Survey. IOM, Geneva, 2005.

http://www.iom.int/jahia/webdav/site/myjahiasite/shared/shared/mainsite/published_docs/books/data_res_human.pdf

Let's Talk: Developing Effective Communication with Child Victims of Abuse and Human Trafficking, UNICEF, Pristina, 2004.

http://www.childtrafficking.org/pdf/user/handbook_lets_talk_a5_eng.pdf

Handbook on Anti-Trafficking Data Collection in South-Eastern Europe: Developing Regional Criteria. ICMPD, Vienna, 2010.

http://www.ungift.org/doc/knowledgehub/resource-centre/ICMPD_Handbook_on_Anti-Trafficking_Data_Collection_in_SEE.pdf

Human Trafficking: New Directions for Research. Discussion paper prepared for the International Dialogue on Migration (IDM), Trafficking in Persons and Exploitation of Migrants: Ensuring Protection of Human Rights, Geneva, July 2009.

http://www.iom.int/jahia/webdav/shared/shared/mainsite/microsites/IDM/workshops/ensuring_protection_070909/human_trafficking_new_directions_for_research.pdf

Good practices

Trafficking of Men – a trend less considered: The case of Belarus and Ukraine. Prepared by R. Surtees, MRS No. 36, IOM, Geneva, 2008.

http://publications.iom.int/bookstore/index.php?main_page=product_info&products_id=311

The United Nations Office on Drugs and Crime (UNODC) provides different research examples and tools related to Trafficking and Smuggling in Persons:

<http://www.unodc.org/unodc/en/human-trafficking/publications.html>

In Pursuit of the Southern Dream: Victims of Necessity – Assessment of the irregular movement of men from East Africa and the Horn to South Africa. IOM, Geneva, 2009.

http://publications.iom.int/bookstore/free/In_Pursuit_of_the_Southern_Dream.pdf

Stolen Smiles: The physical and psychological health consequences of women and adolescents trafficked in Europe. London School of Hygiene and Tropical Medicine (with IOM as research partner), London, 2006.

<http://genderviolence.lshtm.ac.uk/files/Stolen-Smiles-Trafficking-and-Health-2006.pdf>

Second Annual Report on Victims of Trafficking in South-Eastern Europe. Prepared by R. Surtees, IOM, Geneva, 2005.

http://www.iom.int/jahia/webdav/site/myjahiasite/shared/shared/mainsite/published_docs/studies_and_reports/second_annual05.pdf

C.6 Migration and Health

Target population

Migration health is an increasingly important research field. Main areas of research on migration and health include *inter alia* migrants' state of health (e.g. morbidity and mortality burden, risk factors), entitlement of migrants to health care (e.g. existing gaps and discrepancy between legislation/policy and practice), accessibility of health services (i.e. linguistic, cultural and other obstacles) and quality of health services (e.g. sickness prevention and health promotion). Studies on the mobility of health workers might be particularly relevant for ACP countries given the crucial role physicians and nurses play for the national public health systems.

Different empirical studies have shown that migrants usually present different health characteristics and health-related behaviour compared to the inhabitants of destination countries (IOM, 2001). Thus, health assessments focus on investigating the health conditions of migrants and ethnic minorities, including particularly vulnerable groups such as refugees and asylum seekers; undocumented/irregular migrants; ethnic minorities, such as Roma; victims of Trafficking in Persons etc. Studying these special migrant groups often requires moving to areas difficult to access as well as developing specific strategies to involve them in research.

Suggestions for research methods

Addressing the health needs of migrants not only improves migrant health but can also lead to a reduction in stigma and facilitate integration of migrants, reduce long-term health and social costs borne by sending, transit and receiving as well as return countries, protect global public health and, consequently, contribute to social and economic development. Thus, research on migration health should go beyond infectious diseases and border control to include migration related health vulnerabilities, non-communicable diseases, mental health, occupational health, environmental health, as well as access to health care and human rights issues.

The selection of the appropriate research method largely depends on the research area and the objectives of the study. Migration health assessments, for instance, aim at creating a medical history for each individual which means that every single relevant medical event should be recorded. Self-administered questionnaires might not work particularly well, as a migrant might not indicate a relevant medical event of his/her life due to fear of being excluded from a resettlement or aid programme (IOM, 2001). Studies on the accessibility of health services often use quantitative data on the utilization of such services but further need qualitative instruments to correctly assess actual health needs as well as barriers not allowing efficient use of health services provided to migrants. It should also be noted that there is often a lack of

evaluation of the different research efforts in migration and health making it difficult to assess which approach configures as good or best practices.

Examples (assessing migrants' state of health and vulnerability)

The *Integrated Bio-Behavioral Surveillance Surveys (IBBS) among migrant sex workers* is a good research example conducted by IOM's Migration Health Division (MHD) in different African countries such as Kenya and Somalia. By applying unique sampling methods to include hard-to-reach populations in migration health studies, this research method was able to provide insights on how the context of mobility (spaces of vulnerability) can lead migrants to engage in risky health behaviours and result in inequitable access to health programmes and services. In Hargeisa, Somaliland, Somalia, the IBBS aimed at measuring prevalence of HIV and syphilis and describe characteristics of sex work among female sex workers (FSWs). A cross-sectional survey included 237 FSWs using respondent-driven sampling (RDS). A face-to-face, structured interview using handheld-assisted personal interviewing (HAPI) on personal digital assistants (PDAs) was completed and blood collected for serological testing. The template used in this study is divided into eleven different sections: i) Demographic Characteristics; ii) Sexual History: Numbers & Types of Partners; iii) Sexual History: Transactional Sex; iv) Sexual History: Non Transactional / Paying Sexual Intercourse; v) Male Condoms; vi) Female Condoms; vii) STIs and STI Treatment Seeking Behaviour; viii) Knowledge, Opinions, and Attitudes; ix) Substance Use; x) Media & HIV Intervention Programme Exposure; and xi) Stigma and Discrimination (for full survey questionnaire please see annex 4)

Another good example for health research with vulnerable migrant populations is the study entitled 'Stolen Smiles – The physical and psychological health consequences of women and adolescents trafficked in Europe' carried out by a research group including the London School of Hygiene & Tropical Medicine, Animus Association Foundation (Bulgaria), the International Organization for Migration (IOM), La Strada (Czech Republic), On the Road (Italy), Pagasa (Belgium) and Poppy Project (UK). This study was conducted to gain a comprehensive view of women's health needs after a trafficking experience in order to foster care policies and service strategies that will improve women's chances of regaining their health and well-being. By carrying out a detailed assessment while these women were in care of post-trafficking service providers, the study aimed at i) generating qualitative and quantitative data (some of the first-ever statistical data produced on this subject) on the perceived health symptoms; ii) at examining how women's health needs change over three stages of the care service (i.e. crisis intervention, adjustment and long-term symptom management); and iii) identifying symptom patterns and health priorities of women in post-trafficking service settings. Common research methods usually designed for general population screening would have been inappropriate for women who have been trafficked and sexually exploited, thus, adaptations allowing to capture the different health complication suffered by the target population were required: a semi-

structured questionnaire including several open-ended questions to enable women to elaborate on the different issues explored, the study team elected to use self-report rather than clinical review to better understand how women perceive and prioritise their own health needs, and to gain insights into the changes in women's health all women were interviewed at three different time periods. The questionnaire was divided into four parts: a) demographic/background information, b) physical health, c) experiences of violence, and d) mental health. Existing tools used to capture post-trauma symptoms (i.e. Harvard Trauma Questionnaire (HTP) and three sub-scales of the Brief Symptom Inventory (BSI)) were used to capture mental health conditions of the target population. When investigating health conditions of vulnerable groups, particular emphasis needs to be given to ethical considerations to assure the study does not put individuals at risk of imminent or future harm. The ethical and safety measures applied in this study relied upon WHO's ten guiding principles outlining the minimum standards when working with women who have been trafficked (see *WHO ethical and safety recommendations for interviewing trafficked women*, Zimmerman, C. and C. Watts, London School of Hygiene & Tropical Medicine and World Health Organization, 2003).

Example (analysing the mobility of health professionals)

An innovative example for studying the movement of physicians, nurses and other health employees is the project entitled "Mobility of Health Professional" (MoHProf) implemented by a group of scientific institutions together with worldwide active international health service organizations⁹ and funded by the EC. The main objective of the project is to research current trends of mobility of health professionals to, from and within the EU. Research will also be conducted in non-European sending and receiving countries, but the focus lies on the EU. Through comparative country studies this project aims at assessing the impact of different types of migration on national health systems and at facilitating policies on human resources planning. The project measures migration flows of health professionals but also gathers qualitative information in relation to their profession, motivations for moving abroad and social context. This study utilizes in-depth interviews with key stakeholders following thematic guidelines and triangulates the findings with already existing data and statistics. MoHProf aims at the developing conceptual frameworks for monitoring systems concerning the mobility of health workers and recommendations on human resource policies in European and third countries for policy and decision makers (for more details see <http://www.mohprof.eu/LIVE/>).

⁹ The participants form a Project Steering Group, while the research will be supervised by a Research Steering Group and conducted by Regional Research Partners. The lead partner of MoHProf is the Scientific Institute of the German Medical Association (WIAD); other participants are the International Organization for Migration (IOM), Mission with Regional Functions, South Africa and Belgium; Medical University of Varna (MUV), Bulgaria; Centre of Migration Research of the Warsaw University (CMR), Poland; Institute of Health Policy and Development Studies of the University of the Philippines (IHPDS); Public Health Institute (PHI), USA; International Hospital Federation (IHF), France; International Council of Nurses (ICN), Switzerland; World Medical Association (WMA), France; European Medical Association (EMA), Belgium; and Global Health Workforce Alliance (GHWA), Switzerland (for details see <http://www.mohprof.eu/LIVE/>).

Useful links

Guidelines

The *IOM Migration Health Services Medical Manual* (2001 Edition) is a reference tool providing guidelines for the promotion and application of best practices in the areas of health management, disease prevention and medical and practical treatment for health care activities with immigrants.

http://publications.iom.int/bookstore/index.php?main_page=product_info&cPath=19&products_id=270

WHO ethical and safety recommendations for interviewing trafficked women, prepared by Zimmerman, C. and C. Watts, London School of Hygiene & Tropical Medicine and World Health Organization, 2003.

<http://www.who.int/gender/documents/en/final%20recommendations%2023%20oct.pdf>

Good practices

The IOM-UNAIDS/PAF-WHO assessment on mobility and HIV vulnerability among Myanmar migrants in Mae Sot District, Tak Province, Thailand, examines environmental and social factors, service access, knowledge, and behavioural vulnerabilities, along with gender issues, stigma and discrimination.

<http://www.iom-seasia.org/resource/pdf/AssessmentofMobilityHIVMyanmar.pdf>

For HIV assessment and studies with migrant populations please see the Migration and Health Department (MHD) section under publications of the IOM office in South Africa hosting different HIV and mobility related studies.

http://iom.org.za/site/index.php?option=com_docman&task=cat_view&gid=22&Itemid=238

Integrated Biological and Behavioural Surveillance Survey (IBBSS) in the commercial Agricultural Sector of South Africa part of an ongoing project targeted at farm workers called the “Ripfumelo Project” implemented by the Partnership on HIV and Mobility in Southern Africa (PHAMSA)/International Organization for Migration (IOM). The main purpose of this survey was to obtain information on the prevalence of HIV among farm workers and to document their behaviours, perceptions and attitudes regarding HIV-related issues. This study comprised a survey on cross-sectional HIV prevalence, Knowledge, Attitude, Practice and Behaviour (KAPB) among farm employees on 23 farms in three areas in the Limpopo Province, and Mpumalanga Provinces, South Africa.

http://iom.org.za/site/index.php?option=com_docman&task=doc_download&gid=173&Itemid=238

C.7 Migration and the Environment

Target population

The nexus between migration and the environment can be approached from different research angles: studies can aim at measuring the impact of environment on current population movements, focusing in particular on vulnerable or displaced people; forecast future migration trends and its implications for disaster risk reduction and climate change adaptation plans to lessen the impact of changing environmental factors; or produce agent-based modelling trying to predict behaviour of individuals in relation to climate change (IOM, 2009b).

Terms such as environmental/climate change refugees or environmentally-displaced persons characterizing such movements as forced migration are often used to describe the whole category of people who migrate because of environmental factors. However, such a definition does not consider people living in a place where the environment changes gradually and, thus, often does not represent the only driver of migration (GMF, 2010). Furthermore, terms such as environmental/climate change refugees have no legal basis in international refugee law and could, thus, mislead and potentially undermine the international legal regime for the protection of refugees.

If a study focuses on people who moved in response to environmental changes in their usual habitat, it is essential to clearly define the concepts “environment” and “migrant”. In the absence of an international agreed definition, the Foresight: Migration and Global Environmental Change project developed the concept ‘Migration influenced by environmental change’ ‘where environmental change can be identified as affecting the drivers of migration, and thus is a factor in the decision to migrate. This concept acknowledges that migration is already occurring in most parts of the world as a result of these drivers. The decision to migrate is influenced by five broad categories of ‘drivers’: economic, social, environmental, demographic and political. This influence is most pronounced for economic, environmental and, to a lesser degree, political drivers.’ (Foresight: Migration and Global Environmental Change, 2011) This definition includes international as well as internal movements and, indeed, evidence has shown that environmental migration often takes place within the same country or nearest national border. Further criteria helpful to define the target population are the time and space dimensions of the environmental process and its migration response as illustrated by the table 6 below:

Table 6: Range of spatial and temporal scales of environment and migration processes

Environmental processes		Migration response	
Time	Space	Time	Space
Gradual	Local	Temporary	Local
Sudden	National	Seasonal	Rural to rural
	Global	Yearly	Rural to urban
		Permanent	Urban to rural
			International

Source: IOM, 2009c.

Suggestions for research methods

Environmentally-induced migration includes forced movements taking place after sudden-on set events (e.g. earthquakes, tsunamis or volcano eruptions) but also voluntary movements as a result of slow-on set events (e.g. desertification, sea level rise, droughts). However, in the case of migration as a result of slow on-set environmental degradation, which represents the largest share of environmentally-driven migration, environmental change is usually linked to other economic or social factors making meaningful research particularly difficult and challenging. Studies should ideally aim at isolating environmental variables to prove its driving force – see EACH-FOR below as example.

As mentioned above, studying the relationship between migration and environment can involve different approaches and various types of migrants. The table 7 below illustrates the migration-environment nexus, while table 8 summarizes possible research assessment tools according to their main research objectives:

Table 7: A comprehensive overview of the migration–environment nexus

Impact of		Environment on migration				Migration on the environment	
		Non-forced	Forced	Internal	External	Origin	Destination
Process and Events							
Environmental degradation	Early stage	Majority of EM. Temporary and permanent.	NA	Majority of EM (e.g. rural-urban migration)	Primarily regional. Incidental impact on international migration	Enables environmental recovery	Both positive and negative impacts possible depending on the level of socio-economic integration of EM
	Irreversible stage	NA	Usually permanent. Potential need for planned relocation			NA	
Events (Natural disasters)		NA	Usually large-scale and temporary	Vast majority of displaced are IDPs	Possible but limited cases of cross-border movements (mainly temporary)	Opportunity for sustainable return and reconstruction	Negative impact on environment and host communities if massive and not mitigated

Source: IOM, forthcoming.

Table 8: Characteristics of different approaches to assessing the migration–environment nexus

Type of migration	Displacement		→	Adaptation strategy
Assessment type	Impact	Vulnerability	Adaptation	Integrated
Scientific objectives	Impacts on migration under future climate	Processes affecting vulnerabilities to changes in the climate that are likely to lead to migration	Processes affecting the uptake of migration as an adaptation strategy	Interactions and feedbacks between multiple drivers of, and impacts on, migration
Practical aims	Actions to reduce risks	Actions to reduce vulnerability	Actions to improve adaptation	National, regional and global policy options and costs
Research methods	<ul style="list-style-type: none"> • Standard approach • Drivers-pressure-state-impact-response (DPSIR) methods • Hazard-driven risk assessment GIS 	<ul style="list-style-type: none"> • Vulnerability indicators and profiles • Past and present climate risks • Livelihood analysis • Agent-based methods • Narrative methods • Risk perception, including critical thresholds • Development/sustainability policy performance • Relationship of adaptive capacity to sustainable development 	<ul style="list-style-type: none"> • Integrated assessment modelling • Cross-sectoral interactions • Integration of climate with other drivers • Stakeholder discussions • Linking models across types and scales • Combining assessment approaches/methods 	
Spatial domains	Top-down global → local	Bottom-up local → regional (macro-economic approaches are top-down)		Across scales – global/regional/national
Types of direct environmental drivers	Sea-level rise	Flooding, water stress		Changes in patterns and distribution of rainfall
Types of indirect environmental drivers	Government resettlement programmes	Changes in food security		Changes in employment opportunities
Examples	Nicholls et al., 2008	McLeman and Smit, 2006; Smith et al., 2008		Black et al., 2008

Source: Adapted from Carter et al., 2007 in IOM, 2009c.

For assessment studies on Disaster Risk Reduction and Climate Change Adaptation the appropriate research method will mainly depend on the scope of the study (from Disaster Risk Reduction to sustainable development), the relevance of climate related factors and the research target group (vulnerable groups, local community, etc.). Integrated approaches focusing at the causes of vulnerability, developing strategies to prevent risks and improve risk management and planning and developing climate resilient livelihood strategies, etc. are recommended. For ACP countries with no previous research in this subject area, a Vulnerability and Capacity Analysis (VCA) might represent a useful start with in order to understand and prioritize vulnerabilities, risks and capacities as well as empower local communities to develop risk management tools. Additional assessment tools are listed below.

Further to assessment studies on the impact of the environment on migration, related vulnerability and adaptation, studies have been carried out to predict future behavioural changes in response to the impact of climate change. Two common approaches to examine the linkages between climate factors and migration behaviour are the Sustainable Livelihoods Approach (SLA), which aims at understanding how households respond to external vulnerabilities, and the New Economics of Labour Migration (NELM) with a greater focus on the reasons to migrate. While disentangling the different factors influencing migration, these approaches do not produce estimates on the expected number of future migrants. Quantitative methods, such as statistical regression and agent based modelling (ABM), allow to develop projections and to simulate the future behaviour of individuals and households to changing climate factors. Finally, through different Geographical Information Systems (GIS) climate model data can be combined with spatial data which allows analysing and displaying the migration impact of climate change visually (IOM, 2008).

It is important to note that researching the migration and environment nexus does not only consist in specific ad-hoc studies. Questions related to the environment can be integrated in existing sample surveys (e.g. household or health survey) already collecting information on migrants. Possible issues covered include land use and distribution, occupation, soil erosion, rainfall and flood/drought to mention a few (cf. Bilborrow, R. in IOM, 2009c).

Examples (assessing the impact of environmental changes on migration behaviours)

The Environmental Change and Forced Migration Scenarios (EACH-FOR) project tried to isolate the environment as a driver of migration through a series of small scale survey in 23 countries (including several ACP countries – e.g. Haiti, Niger, Senegal, Tuvalu). Aside from some methodological limitations, the EACH-FOR represent a valuable exercise which could be replicated with a nationally representative sample. It gathered primary data collected through semi-structured expert and field interviews, and migrant and non-migrant questionnaires. The table 9 below summarizes the research steps and design issues encountered in the EACH-For

project (for details see <http://www.each-for.eu/index.php?module=main> and Chapter IV in IOM, 2009c).

Table 9: The EACH-FOR Project research steps and design issues

Step	Description	Design issue
1. Hypothesis	<ul style="list-style-type: none"> ▪ Discernable environmental signal in migration today. Null hypothesis: no discernible environmental signal in migration today. 	<ul style="list-style-type: none"> ▪ How to establish whether the environmental signal is discernible in migration patterns? ▪ How to assess or measure environmental signals?
2. Variables	<ul style="list-style-type: none"> ▪ Independent variable of interest: environmental change ▪ Dependent variable: migration 	<ul style="list-style-type: none"> ▪ How to isolate the independent variable of environmental change? ▪ How to determine that presence of independent variable caused dependent variable?
3. Intervention group and control group	<ul style="list-style-type: none"> ▪ Intervention group is made up of people that will experience environmental change ▪ Control group is made up of people that will not experience environmental change 	<ul style="list-style-type: none"> ▪ How to isolate control group that does not experience environmental change (independent variable)?
4. Introduce intervention	<ul style="list-style-type: none"> ▪ Environmental change 	<ul style="list-style-type: none"> ▪ Impossible to control environmental change; need to carefully select case study countries.
5. Measure dependent variables in intervention group and control group	<ul style="list-style-type: none"> ▪ Did migration occur when environment changed? 	<ul style="list-style-type: none"> ▪ How to prove that migration would not have occurred in the absence of environmental change?

Source: IOM, 2009c.

A good example for measuring people’s mobility through natural disasters is provided by the study entitled ‘Monitoring disaster displacement in the context of climate change’ carried out by the United Nations Office for the Coordination of Humanitarian Affairs (OCHA) and the Internal Displacement Monitoring Centre (IDMC) in 2009. The three-step-approach consisted in gathering all information on disaster in one database (EM-DAT), develop criteria to identify disasters most likely to cause displacement, and finally analysing into detail the information available for the disaster identified as relevant (IDMC, 2009).

The study report “*Assessing the Evidence: Environment, Climate Change and Migration in Bangladesh*” is another valuable contribution in the field of migration and environment. It represents a useful tool to promote policy coherence in this thematic area providing possible

ways to include environmentally-induced migration into Bangladeshi overall migration management policy and mainstream migration into national policies on Disaster Risk Reduction, Environment and Climate Change.

The project entitled ‘The Other Migrants: reducing migration pressure from gradual environmental change – environment and sustainable development in Mauritius’ carried out by IOM not only assessed the impacts of environmental changes on migration behaviours identifying vulnerable groups/sites but also suggests possible pilot-projects that could provide alternative solutions to those whose livelihood is threatened by the impacts of climate change, i.e. new activities for small and medium enterprises as a way of adaptation. As translating adaptation into pragmatic actions represents a key challenge, the study also develops a framework for a better assessment of such local-scale environmentally-based pilot-project for adaptation to climate change, making sure that suggested projects are relevant for adaptation (IOM, forthcoming).

Table 10 below provides an overview of the framework/guidelines and the pilot-projects identified, while Table 11 assesses each of them in light of the adaptation framework. A point system based on guidelines allows allocating a score to each pilot project reflecting the compatibility of the project with the adaptation goal of the community. The objective is not to rank the pilot-projects in order to emphasize which ones should be prioritized, but rather to show that various types of projects could fit into the adaptation to current and future environmental changes perspective.

Table 10: Synthesis of the adaptation to climate change framework guidelines

<p>(1.) Socio-cultural dimension</p> <p><i>Pilot-projects should be consistent with social and cultural values of people and should correspond to communities capabilities/competences/knowledge.</i></p> <p>(1.1.) Consistent with social features and cultural values (what people expect from the present and for the future)</p> <p>(1.2.) Located near the family/community’s living place, and does not induce displacements of the community (or a part of it) during long periods of time</p> <p>(1.3.) Based upon existing knowledge and competences (in order to avoid socio-cultural ‘maladaptation’)</p> <p>(1.4.) Do not require too complicated new skills to be developed</p>
<p>(2.) Environmental dimension</p> <p><i>Pilot-projects should be consistent with the nature and the dynamics of local ecosystems and should take into account climate change potential threats on the environmental conditions.</i></p>

- (2.1.) Do not degrade the direct environment (through overexploitation, degradation of resources, destruction of habitats, etc. - idea of avoiding environmental 'maladaptation')
- (2.2.) Do not degrade the indirect environment either.
- (2.3.) Favour the protection function of the ecosystems with regard to current natural hazards and climate change threats (such as buffer zones on the coasts)
- (2.4.) Take into account the range of uncertainties concerning the impacts of climate change at local scale, thus preserves some possibilities for adjustment.
- (2.5.) Are not focused on reducing greenhouse gases emissions, but rather on adapting to environmental changes

(3.) Economic dimension

Pilot-projects should be economically viable.

- (3.1.) Allow local vulnerable communities to improve or at least maintain their revenues
- (3.2.) Ensure a certain level of diversification of activities and sources of revenues
- (3.3.) Consistent with future environmental changes projections (in order to avoid economic 'maladaptation')

(4.) Institutional, legal and administrative dimension

Pilot-projects should consistent with the national legal, administrative and institutional framework.

- (4.1.) Fit in the national entrepreneurship framework
- (4.2.) Fit in the national legal framework
- (4.3.) Is ideally relatively easy to formalize, or at least would benefit from administrative support.

Source: IOM, forthcoming.

<i>Pilot-projects with indirect links with climate change threats</i>																
8. Local houses building and up-keeping	0.5	1	1	1	0.5	0.5	0.5	1	1	1	1	1	1	1	1	13.0
9. Seaweed farming (sea cucumber)	1	0.5	0.5	1	1	0.5	0	0.5	1	1	1	0.5	1	1	0.5	11.0
10. Patchwork	1	1	1	1	1	0	0	1	1	1	0	1	1	1	0	12.0
11. Local handicraft	0.5	1	0.5	1	1	0.5	0	0.5	1	1	1	0.5	0.5	1	1	11.0
12. Rooftop Gardening	0.5	1	0.5	0.5	0.5	0	0	0	1	0.5	1	0	0	1	0	6.5
13. Composting	0.5	1	0.5	0.5	1	0	0	0	1	0.5	0	0	0	1	0	6.0
<i>Some examples of climate change mitigation pilot-projects (which do not fit into the adaptation framework)</i>																
.... Solar water heater installation enterprise	0.5	1	0.5	-1	0	0	0	1	-1	1	1	1	1	1	1	3.5
.... Organic fertilizer production enterprise	0.5	1	0.5	-1	0.5	0	0	0.5	-1	1	0	0.5	0	1	0	3.5
.... Plastic recycling employers	0	0.5	-1	0.5	0.5	0	0	0	-1	1	1	0	1	1	0.5	4.0

* Regarding Adaptation to current and future environmental changes

** These scores are just indicatives and can roughly change from one evaluator to another.

Legend:

The pilot-project fits in the following guidelines		Points equivalence
1	Sure	1
0.5	Potentially, depending on how it is designed, implemented and managed	0.5
0	No specific relation between the pilot-project and the guideline	0
-1	Counterproductive effect : the pilot-project act against the guideline	- 1

Source: IOM, forthcoming.

Useful links

Guidelines

Migration, Environment and Climate Change: Assessing the Evidence (F. Laczko and C. Aghazarm, eds). IOM, Geneva, 2009.

http://publications.iom.int/bookstore/free/migration_and_environment.pdf

Linking climate change, environmental degradation and migration: a methodological overview. Prepared by E. Piguet, *Wiley Interdisciplinary Reviews: Climate Change*, 1(4): 517–524, July/August 2010. Introduces a typology identifying six research method families and presents main technical features and empirical results of each family of methods.

Climate Vulnerability and Capacity Analysis (CVCA) aims at analysing vulnerability to climate change and adaptive capacity at the local level, and combining community knowledge and scientific data to yield greater understanding about local impacts of climate change.

www.careclimatechange.org/cvca

Vulnerability and Capacity Analysis (VCA) helps to understand and prioritize vulnerabilities, risks, and capacities, as well as empowers communities to develop risk management solutions. The VCA is not prescriptive, but consists of a tool box that is adapted to the local context.

<http://www.ifrc.org/Docs/pubs/disasters/resources/preparing-disasters/vca/vca-toolbox-en.pdf>

Community Risk Assessment (CRA) uses participatory action research methods to place communities in the lead role for the assessment, active planning, design, implementation and evaluation of activities aimed at reducing the community's risk to disaster. CRA focuses on identifying the most vulnerable groups in a community, and explores what local capacities can be used to enhance the resilience of the community members.

<http://www.proventionconsortium.org/?pageid=43>

CRiSTAL (Community Based Risk Screening Tool – Adaptation & Livelihoods) is a decision support tool for assessing and enhancing project impacts on local adaptive capacity to climate variability and climate change.

<http://www.cristaltool.org/content/download.aspx>

Guidance on Disaster Risk Reduction indicators measuring the Reduction of Disaster Risks and the Implementation of the Hyogo Framework for Action.

http://www.preventionweb.net/files/2259_IndicatorsofProgressHFA.pdf

http://www.preventionweb.net/files/2259_IndicatorsofProgressHFAannexes.pdf

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Environmental Impact Assessment (EIA) identifies the environmental impacts (both beneficial and adverse) of planned public and private development activities. While the focus of EIA is often dominantly environmental (biophysical), Social Impact Assessments (SIA) concentrate on social and economic aspects. SIA can be used as an independent assessment but is often combined with EIA as Environmental and Social Impact Assessment. For a description of EIA and SIA procedures see <http://www.environmental-mainstreaming.org/tool-profiles.html>

More recently, Strategic Environmental Assessments (SEA) have been adopted providing environmental assessment of policies, strategies, plans and programmes. While not replacing EIA practices at the project level, SEA is widely considered as prerequisite for effective EIA practices, especially in countries where environmental considerations have not yet been mainstreamed into national policy frameworks. For details see the Guidance on SEA in Development Cooperation developed by the *OECD DAC* Environment Task Team on SEA <http://www.seataskteam.net>

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OIM Organisation internationale pour les Migrations
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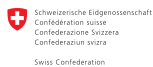


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