

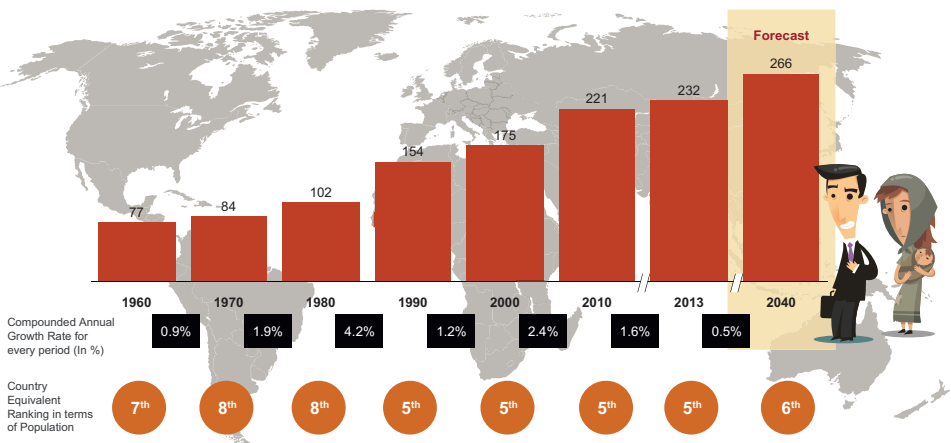
RISING GLOBAL MIGRANT POPULATION



INTERNATIONAL MIGRANTS HAVE INCREASED BY ABOUT 60 MILLION IN THE LAST 13 YEARS and now total more than 230 million— equivalent to the 5th most populous country in the world

The fastest-growing period of migration was the 1980s. From 1990 to 2013, migration increased an additional 51% reaching 232 million people. Migration is expected to continue growing to reach 266 million by 2040. In general, migration numbers are underreported because national censuses do not capture temporary migration

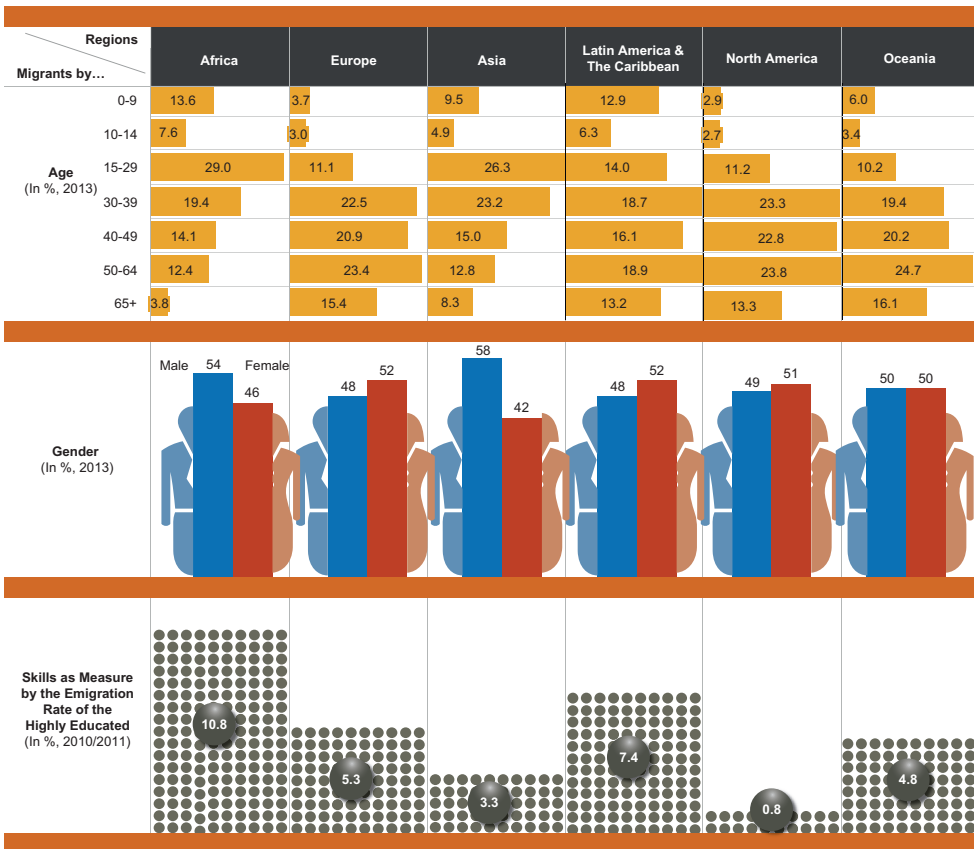
International Migrants Population
(In Millions, 1960-2040)



MOST MIGRANTS COME FROM THE WORKING AGE POPULATION, with female migrants representing 48% and the brain drain being highest in Africa

Three-quarters of global migrants are within the working age, signaling that their primary reason for migrating is for income and job purposes. The median age of migrants in the North (developed world) is 42 years, versus 33 in the South, according to the International Organization for Migration. The difference is partly explained by the fact that migrants coming from the South to the North enjoy higher living standards and are thus likely to stay longer. The brain drain is most pronounced in Africa, where the percentage of skilled emigrants as a share of all emigrants is almost 10%

Migrants by Age, Gender and Skills
(In %, 2013 and 2010/11)

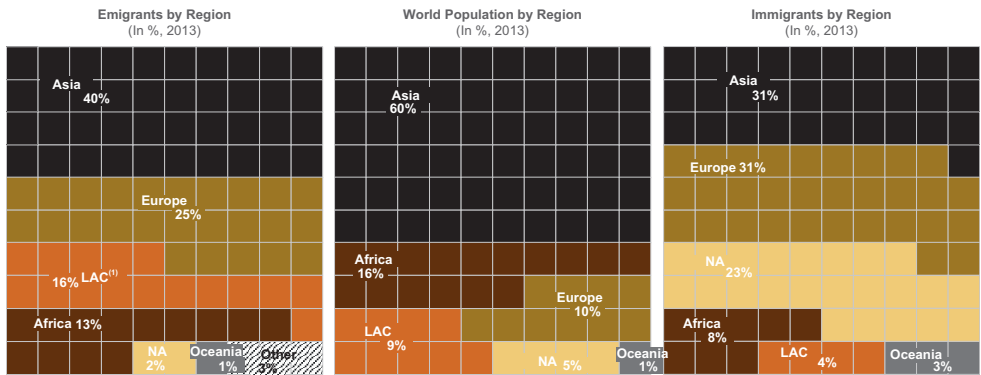


Source- Upper and Middle Charts: United Nations Population Division
Source- Lower Chart: "World Migration in Figures", OECD-UNDESA, Oct. 2013

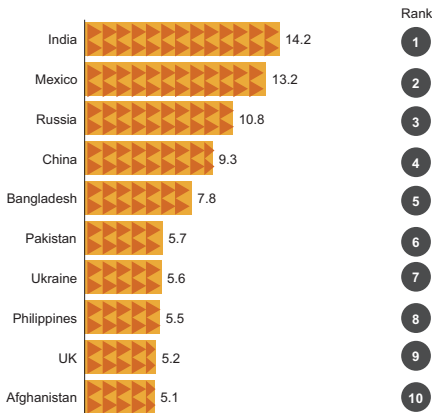
DESPITE REPRESENTING JUST 5% OF THE WORLD'S POPULATION, NORTH AMERICA HOSTS 23% OF GLOBAL IMMIGRANTS while India is the largest source of emigrants

The distribution of immigrants and emigrants around the world does not reflect the global distribution of population. Latin America is host to 9% of the world population but produces 16% of the world's migrants. India, Mexico and Russia are the biggest sources of migrants. Russia is also the second largest recipient of migrants, attracting many people from former Soviet Union countries. The US is the top destination in the world

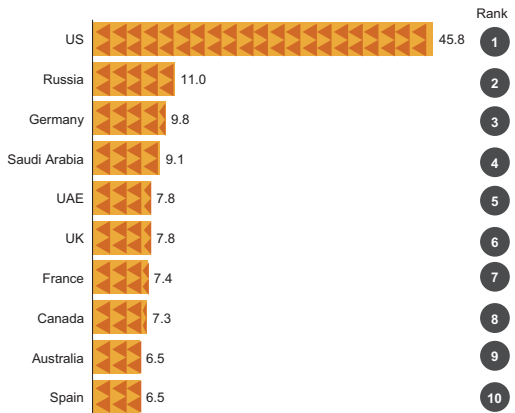
Immigrants and Emigrants Distribution by Region (In % of Total, 2013)



Countries with Highest Number of Emigrants (In Million, 2013)



Countries with Highest Number of Immigrants (In Million, 2013)

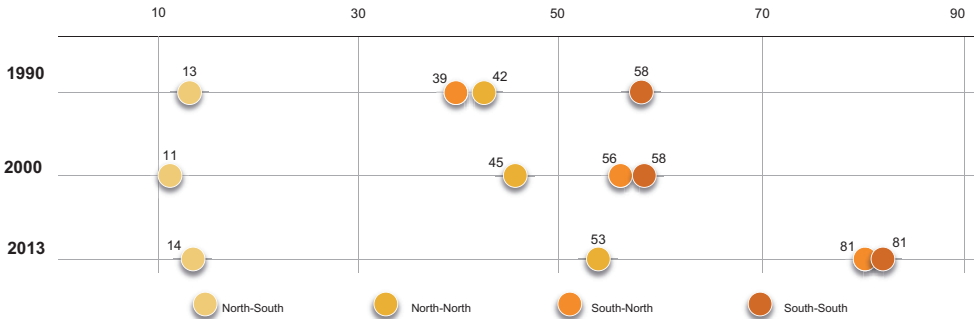


Note: (1) Latin America and the Caribbean
 Source- Upper Charts: "International Migration Report", United Nations, 2013
 Source- Lower Charts: United Nations Population Division

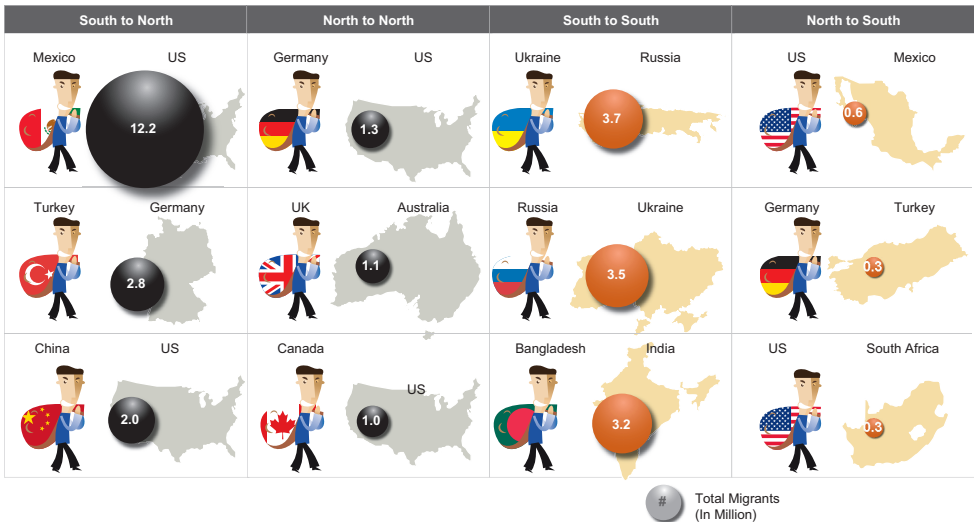
THE SOUTH-SOUTH AND SOUTH-NORTH CORRIDORS ARE THE TWO MAJOR CHANNELS FOR MIGRANT MOVEMENT with the Mexico-US corridor being the largest globally

In 2013, the number of international migrants born in the South who live in the North reached ~81 million. The South-South Migration corridor has become the largest one. Some OECD research shows that large South-South migration has different dynamics where host countries generally find it hard to integrate immigrants into society (as opposed to a generally more ethnically homogeneous North). Overall, the US represents the key destination for major migrant corridors with Mexico-US being the largest

Migration Corridors
(In Million, 1990, 2000 and 2013)



Top Pathways by Corridor
(In Million, Latest Available Data)

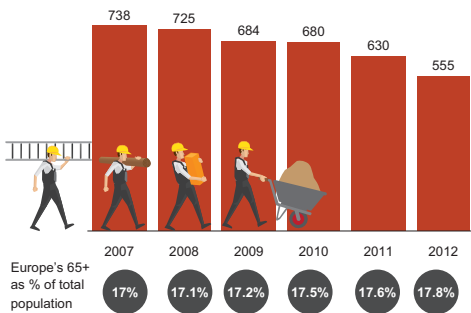


Source- Upper Chart: "International Migration Report", United Nations, 2013
Source- Lower Chart: "World Migration Report", International Organization for Migration, 2013

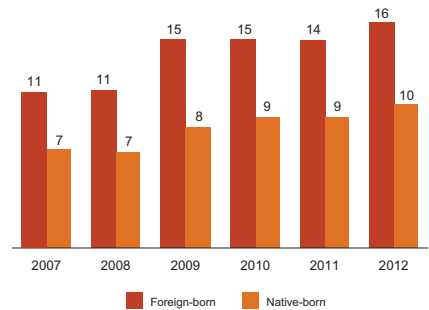
LABOR MIGRATION INTO OECD COUNTRIES HAS DECLINED, with migrants suffering from higher unemployment rates and arriving mostly from Europe

Labor immigration has been utilized in many OECD countries (and in Europe in particular) as a way to mitigate the ageing population problem. While this has helped in the short run, in the long run an overreliance on these policies will likely be problematic. Moreover, the data shows that foreign-born workers fare much less favorably in labor markets and face much higher unemployment rates than native born workers

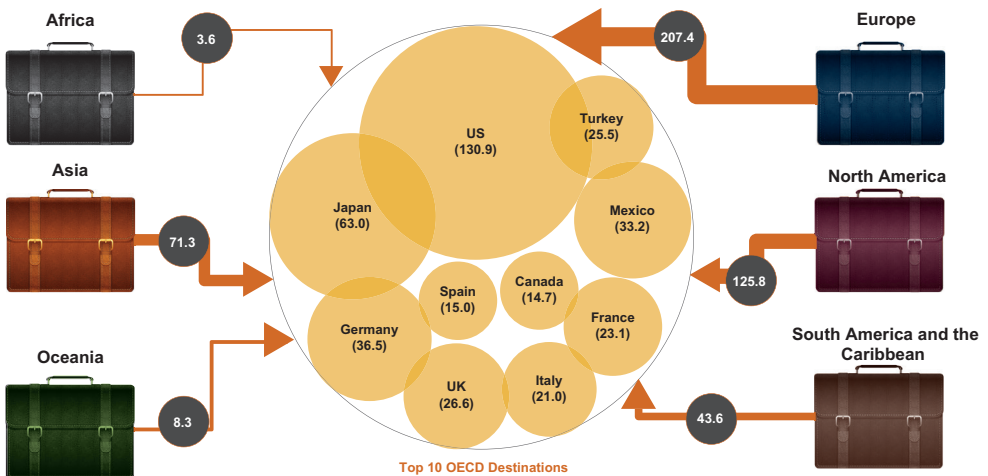
Permanent Immigration in OECD Countries for Work
(In Thousand, 2007-2012)



EU-27 Unemployment Rate across Migrants and Native-Born
(In %, 2007-2012)



Immigrants Labor Force by Place of Birth and Country of Residence
(In Million, Latest Available Data)

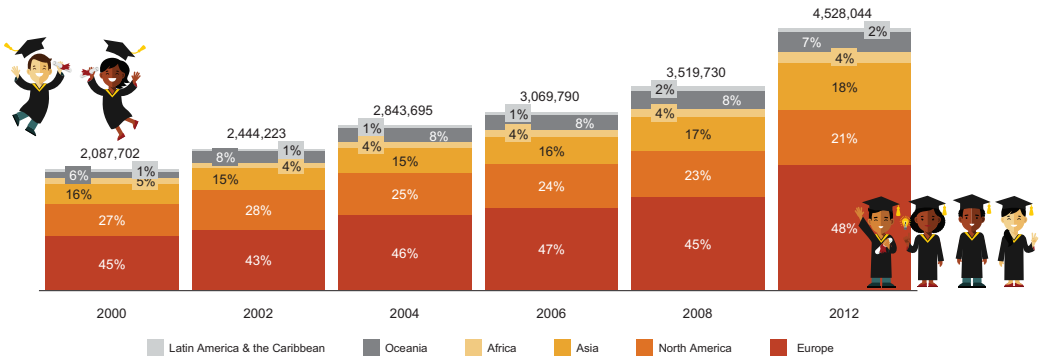


Sources- Upper Charts: "International Migration Outlook", OECD, 2014; EuroStat
Source- Lower Chart: OECD Indicators

PEOPLE ALSO MOVE FOR EDUCATION ATTAINMENT, WITH FOREIGN STUDENTS MORE THAN DOUBLING SINCE 2000; China is the major source of students and the US and Europe are the major destinations

The number of students enrolled outside their country of citizenship has reached ~ 5 million, with 75% enrolled in an OECD country. The largest number of students have been coming from China and India. This explains why these two countries will be the main sources of skilled labor (among the G-20 countries) by 2025

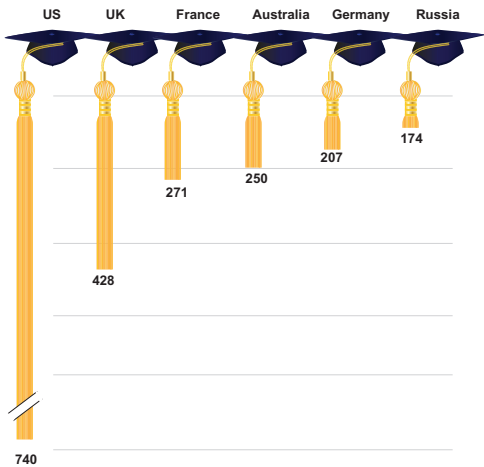
Foreign Students Enrolled in Tertiary Education, by Region of Destination
(In Number and In % of Total, 2000-2012)



Top Origin Countries of International Students
(In Thousand, Latest Available Year)



Top Destination Countries for International Students
(In Thousand, Latest Available Year)

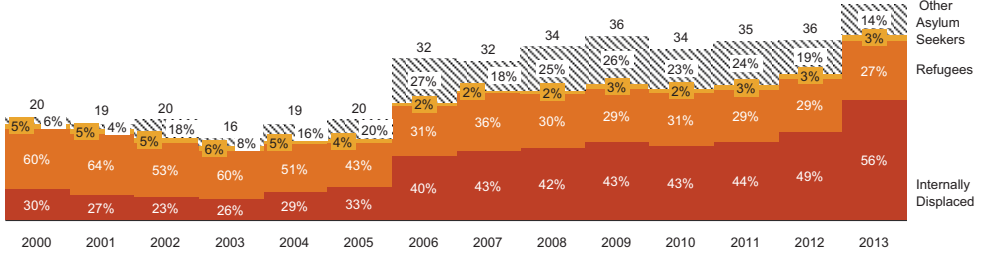


Source- Upper Chart: "Education at a Glance", OECD, 2014
Source- Lower Charts: UNESCO

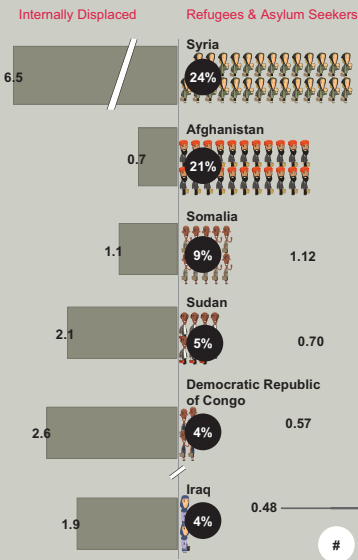
MIGRANTS SEEKING REFUGE OR THOSE INTERNALLY DISPLACED HAVE MORE THAN DOUBLED SINCE 2000, driven mostly by rising conflict

Refugees, asylum seekers and internally displaced people have increased about 6% a year since 2000. The growth in the incidence of forced migration is mostly a result of persecution, conflict, generalized violence, or human rights violations. The number of IDPs and refugees has been highest in Syria with a large number leaving to the neighboring countries of Lebanon and Jordan. Some initial estimates show that 3.8 million Syrian refugee and IDP children are without schooling. Pakistan tops the list of refugee destinations, hosting more than 1.6 million, mostly from neighboring Afghanistan

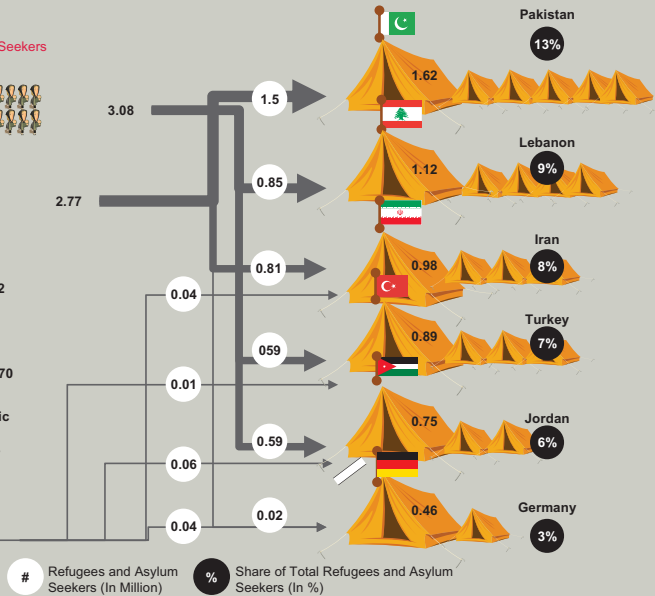
Refugees, Internally Displaced and Asylum Seekers over Time
(In Million and In % of Total 2000-2013)



Top Countries of Origin of Refugees, Asylum Seekers and Internally Displaced
(In Million, 2014)



Top Destination Countries for Refugees and Asylum Seekers
(In Million, 2014)

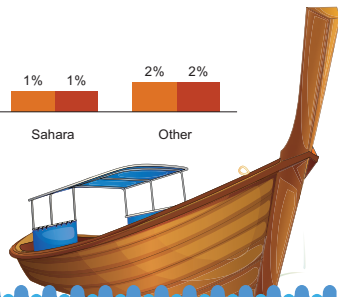
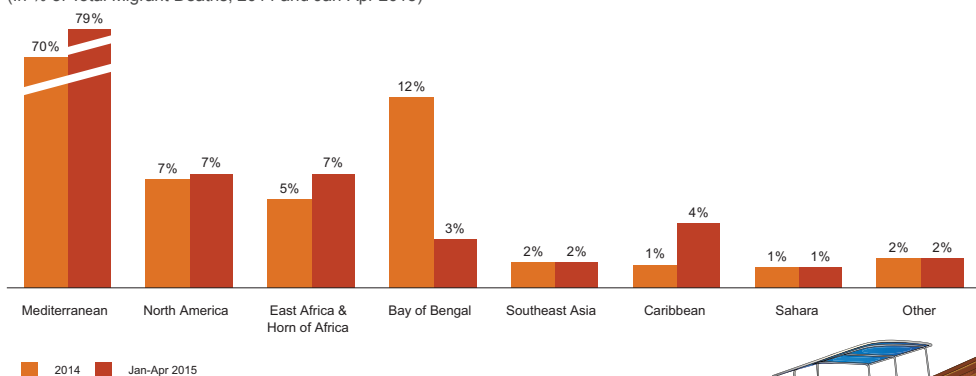


Source- Upper and Lower Charts: Office of the United Nations High Commissioner for Refugees (UNHCR)

WITH RISING CONFLICTS, THE NUMBER OF ASYLUM SEEKERS LOOKING FOR REFUGE IN EUROPE HAS RISEN SHARPLY but so has the number of deaths of migrants crossing the Mediterranean

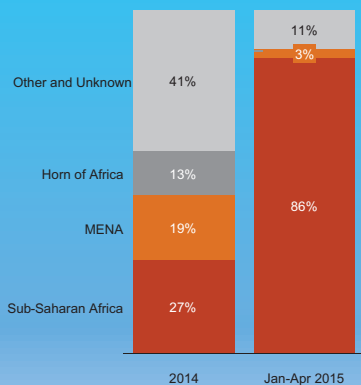
In 2014, asylum applications to rich countries reached their highest level in more than 20 years, with some 866,000 applications lodged, a 45% increase from the previous year, according to the United Nations High Commissioner for Refugees. The main destination for asylum seekers has been Europe; the biggest refugee sources have been Africa and the Middle East. This has turned the Mediterranean Sea into an essential conduit for many people seeking to escape from conflict or human rights abuses. However, the number of deaths of migrants crossing the Mediterranean rose about tenfold in the first few months of 2015 versus the same period in 2014, raising major humanitarian concerns

Region in Which Migrant Death Occurred over Time
(In % of Total Migrant Deaths, 2014 and Jan-Apr 2015)

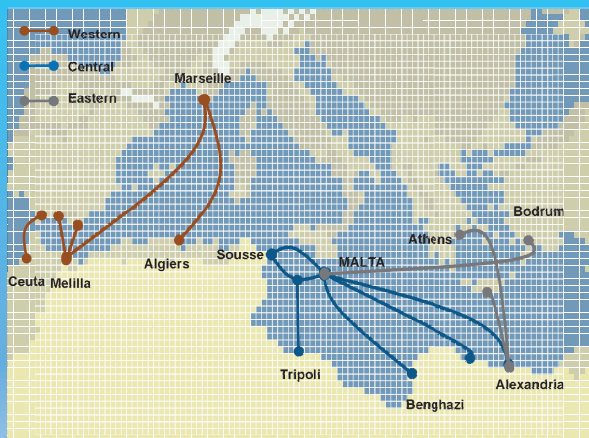


Origin of Migrants Who Died in Mediterranean

(In 2014 and Jan-Apr 2015)



Main Mediterranean Migration Routes

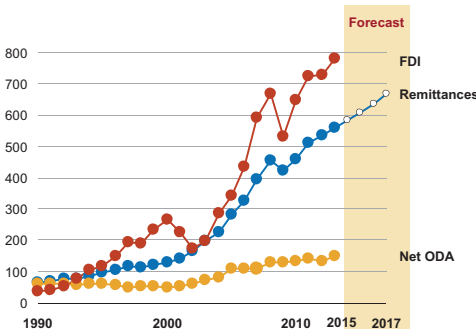


Source- Upper Chart: International Organization of Migration
Sources- Lower Charts: International Organization of Migration; The Economist

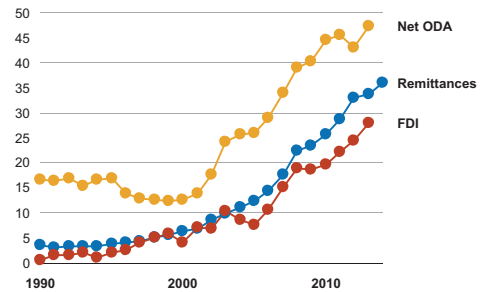
MIGRANTS' REMITTANCES TO DEVELOPING COUNTRIES WILL APPROACH US\$ 600 BILLION IN 2015; transfer costs remain an issue, especially in Africa

Global remittances in 2014 were more than double the level of official development assistance. Least Developed Countries receive more remittances than FDI. The cost of sending remittances is declining across all regions but remains very high in Africa. The World Bank has estimated that as much as US\$ 100 Billion in migrant savings could be created annually if developing countries reduced their remittance transfer costs

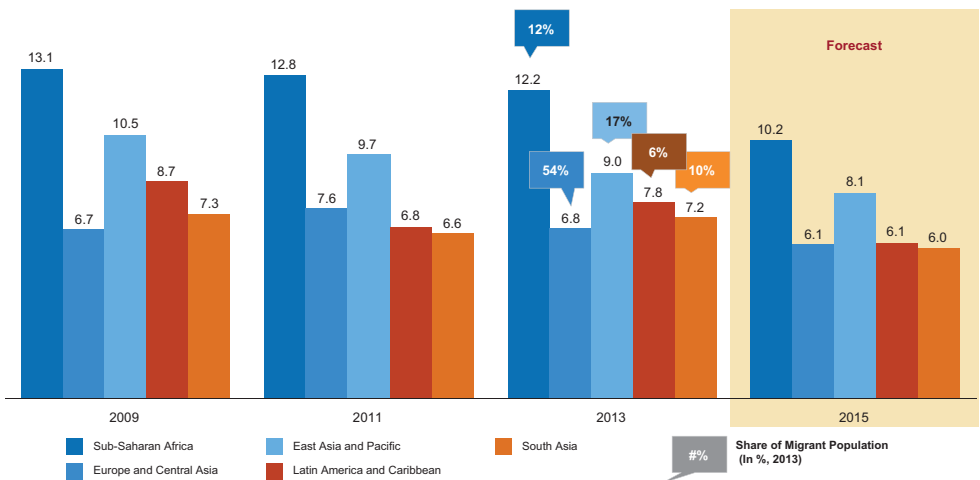
Remittances, FDI to Developing Countries and Net ODA
(In US\$ Billion, 1990-2017)



Remittances, FDI and Net ODA to Least Developed Countries
(In US\$ Billion, 1990-2014)



Average Total Cost by Region
(In % of US\$ 200 Transfer, 2009 - 2015)



Sources- Upper Charts: World Development Indicators; World Bank Development Prospects Group
Sources- Lower Chart: "Remittance Prices Worldwide", World Bank, Mar. 2015; United Nations Population Division