Henley & Partners

Global Mobility Report

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"Times have changed, dramatically so. Migration is now a top-tier political issue interconnected to human rights, development, and geopolitics at national, regional and international levels…The idea that most people do not move or are fixed at a specific location might be appealing but it is wrong. Mobility is an inherent characteristic of all populations unless specific policies or other factors are in place that limit or control that mobility."

International Organization for Migration
World Migration Report 2020

CONTRIBUTORS

DR. PARAG KHANNA
Founder and managing partner of FutureMap, a data- and scenario-based strategic advisory firm, and author of numerous books

DR. JUERG STEFFEN
CEO of Henley & Partners and author of definitive books on high-net-worth relocation to Austria and Switzerland

GREG LINDSAY
Director of Applied Research at NewCities

LORRAINE CHARLES
Research Associate at the Centre for Business Research at the University of Cambridge

CURTIS S. CHIN
Former US Ambassador to the Asian Development Bank, the Milken Institute's inaugural Asia Fellow, and MD of RiverPeak Group, LLC

MADELEINE SUMPTION
Director of the Migration Observatory at the University of Oxford

RYHOR NIZHNIKAU
Senior Research Fellow at the EU's Eastern Neighbourhood and Russia program at the Finnish Institute of International Affairs

SUZETTE HAUGHTON
Senior Lecturer and Head of the Department of Government at the University of the West Indies

ALEXEI CRESNIOV
Director of Deep Knowledge Analytics and author of numerous DeepTech and GovTech reports

DR. CHRISTIAN H. KAELIN
Chairman of Henley & Partners, an expert in investment migration, and the inventor of the passport index concept

PROF. PETER J. SPIRO
Charles Weiner Professor of Law at Temple University Law School

CHARLES PHILLIPS
Independent researcher and consultant for Oxford Business Group

PROF. WILLIAM KERR
D'Arbeloff Professor of Business Administration at Harvard Business School

PROF. SIMONE BERTOLI
Professor of Economics at Université Clermont Auvergne (CERDI) and a Research Fellow at the Institute of Labor Economics

DR. ROBERT MOGIELNICKI
Resident Scholar at the Arab Gulf States Institute in Washington, where he manages the institute's political economy research

JUSTICE MALALA
Award-winning journalist, newspaper columnist, author, and entrepreneur

DOMINIC VOLEK
Group Head of Private Clients and a Member of the Executive Committee of Henley & Partners

The Impact of Covid-19 and the Future of Global Mobility

by DR. PARAG KHANNA
Dr. Parag Khanna is the founder and managing partner of FutureMap, a data- and scenario-based strategic advisory firm headquartered in Singapore, and author of numerous books including Connectography, The Future is Asian.

With our freedom curtailed once again as governments across the world reinstated lockdown measures late last year due to resurgences of coronavirus, it seems paradoxical to be forecasting the future of global mobility. Yet the signs of our innate desire to move were evident before the pandemic struck. In the year preceding our Covid-19 containment, 1.5 billion international travelers and tourists traversed the globe, and more than 270 million people lived outside their countries of origin.

The pandemic has been a miserable experience for billions of people, surely motivating millions to seek to move at the earliest opportunity, from ‘red zones’ with poor governance and inefficient healthcare to ‘green zones’ where future quarantines would be more tolerable and health systems up-to-date. But health is only the most recent and most obvious driver of large-scale migration. Over the past 75 years, labor shortages, political upheaval, economic crises, and climate change have been far more significant factors that have compelled people to move. In many ways, all these variables are interconnected and some even magnify each other. The great reset of today will give way to the next great migration of tomorrow.

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> *The system will not return to what it was: Nationality will not suffice to guarantee safe passage.*

Who will get to move, and how? The system will not return to what it was: Nationality will not suffice to guarantee safe passage. After tumbling in international access from 184 destinations in January 2020 to fewer than 75 countries a year later, America will have to climb back up the rankings to reclaim acceptable passport status. Even for still-powerful passports such as Japan, Singapore, South Korea, and members of the EU, additional protocols will be required to re-attain relatively frictionless mobility. For example, to avoid onerous quarantines, individuals will have to certify their health immunity through vaccination certificates and other special registrations.

Even in a scenario of rapid global deployment of a vaccine, large-scale migration will surely be limited and entrenched at the regional level: Europeans within Europe, Asians within Asia, Latin Americans within the western hemisphere. The current economic depression in many countries, depleted savings, political and cultural xenophobia, and other contemporary realities make this all but certain. Furthermore, high unemployment has led to ‘employment nationalism’, with governments strongly pressuring firms to hire citizens over foreigners.

Mobility will therefore be tied much more to individual merit. For those seeking a clean start far from their regions of origin under existing and expanding highly skilled migrant programs, irrespective of their nationality, rigorous checks on their financial, criminal, and professional history are already the norm. This may seem an onerous development, but it also levels the playing field for hard-working professionals from developing countries.

There is no question that these trends in combination have boosted the appeal of investment migration, whether for digital nomads, those looking to acquire second passports, or those changing nationality altogether. Even prior to the pandemic, Brexit had pushed British professionals to seek German, French, Spanish, and other nationalities based on lineage, or failing that, to acquire residence leading to citizenship in countries such as Portugal. For Americans, the combination of Covid-19, Foreign Account Tax Compliance Act policy, the country’s waning diplomatic prestige, and the prevailing political uncertainty has pushed record numbers to seek second passports or to expatriate: Nearly 6,000 in the first half of 2020, which is almost double the total number for all of 2019.

Americans have relocated to Canada, Europe, and Asia in record numbers, with a tripling of interest in investment migration or citizenship programs over the course of 2020.

Given that continental European passports have retained high global travel mobility and consistently rank highest in the *Kälin – Kochenov Quality of National Index*, it is no surprise that Americans, Asians, and Brits have increasingly sought to acquire European citizenship.

> “
> *...it is no surprise that Americans, Asians, and Brits have increasingly sought to acquire European citizenship.*

Attractive options are also available in countries that have intermediate passport strength but offer open-ended residency. Thailand, for example, has branded itself as a “health oasis” and its Thailand Elite Residence Program for foreigners includes a free annual medical screening. The program allows up to 20 years of residence, and 2020 was a record year, with an almost 25% increase in applications by the end of September compared to the previous year. Dubai, like Bangkok, is a well-connected global hub that is already home to a population that is 90% foreign. Both Thailand and the UAE’s programs are, in effect, indefinite medical tourism in safe, prosperous locations.

Another rapidly expanding category of intentionally temporary destinations for the internationally mobile is countries seeking to attract digital nomads. As telecommuting skyrockets in the wake of the pandemic, countries such as Croatia, Estonia, and Georgia have launched renewable visa schemes to attract service industry workers who are also referred to as tele-migrants. Other countries with high rankings on Tuft University’s Digital Readiness Index include Canada, the Netherlands, and Norway, and others that could likely make similar offerings attractive to millennials and Gen-Zers.

Let us remember that today’s youth constitute nearly 60% of the global population and tend to have fewer assets and children than Gen-Xers or Baby Boomers. They are socially conscious, environmentally aware, and less nationalistic — all of which makes them potentially the most mobile generation in human history. They herald a seminal shift in mobility from being every country for itself to being every person for themself.

WEALTH MIGRATION
Pandemic Likely to Enhance Options for Investor Migrants

by DR. CHRISTIAN H. KAELIN
Dr. Christian H. Kaelin is Chairman of Henley & Partners. He is an expert in investment migration and is the inventor of the passport index concept.

The Covid-19 pandemic has significantly reduced economic growth and income and constricted global mobility due to various concomitant travel disruptions, restrictions, and blockages. Affluent individuals have not escaped these trends, and as a result the number of high-net-worth individuals (HNWIs) who physically migrated dropped during the worldwide lockdowns in 2020. Yet the global crisis is likely to bolster both the supply of and demand for investment migration programs in the year ahead.

In recent years, acquiring alternative residence or citizenship and owning real estate in alternative jurisdictions have increasingly gained in popularity among HNWIs for the security, opportunity, and diversification they are known to deliver. Yet there was a decline in HNWI migration in 2020, as due to the outbreak of the virus, many individuals were unable or unwilling to move.

> “…would-be travelers from countries perceived to have handled the current crisis inefficiently have seen the value of their passports diminish.

Reduced migration during the pandemic has not been a surprise, given the severity of the global health crisis. Going forward, global travel and migration are likely to continue to be impeded by quarantining and health checks. Yet the pandemic is also impacting the movement of wealthy individuals in unexpected ways. For example, would-be travelers from countries perceived to have handled the current crisis inefficiently have seen the value of their passports diminish as other nations refuse them entry. The most striking example is that of travelers from the US who face unprecedented travel restrictions in Europe, albeit on a temporary basis, until the country is considered epidemiologically safe. As a result, interest in investment migration programs — that provide access to alternative options — among Americans soared in 2020. Eric Schmidt, a former CEO of Google who obtained Cypriot citizenship for himself and his family, is just one of the more prominent examples.

In addition, the havoc the pandemic has wreaked on tourism-reliant economies has prompted several Caribbean island nations to introduce new options or discount the investment requirements on existing options. HNWI seeking safe harbors, to which their families can retreat should the need arise, have shown a keen interest in the Caribbean region as the small island nations have handled the pandemic extremely well. Furthermore, St. Lucia has launched the region's first e-payment and processing platform, meaning applications can be made entirely online.

The expectation is that in the not-too-distant future, investor migrants will have even more choice. New residence- and citizenship-by-investment programs and further options are likely be introduced by countries as solutions to alleviate the financial distress caused by the pandemic, as the programs have a proven ability to generate substantial income and create a positive economic impact for their host nations.

> “The expectation is that in the not-too-distant future, investor migrants will have even more choice.

While it is too soon to tell how the pandemic will alter the mix of nations seeing the biggest flows of wealthy individuals, in 2020 China, France, India, the Russian Federation, Turkey — and recently Hong Kong — continued to experience the most significant HNWI outflows. Australia, Switzerland, and the US are expected to remain the preferred destinations for investor migrants over the next decade, and Cyprus, Greece, Italy, and New Zealand are likely to rise up the ranks of sought-after options for relocation.

> “…Cyprus, Greece, Italy, and New Zealand are likely to rise up the ranks of sought-after options for relocation.

Pre–Covid-19, mobility, personal security, and diversification were deemed the primary drivers of demand for alternative residence and citizenship, but the pandemic has introduced new motives for acquiring these assets. As the world's wealthy emerge from the current crisis more acutely aware of their vulnerability to unforeseen events, they are likely to seek additional reassurance that frictionless travel and relocation and quick access to good healthcare will be available to their families in future.

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INVESTMENT MIGRATION
Residence- and Citizenship-by-Investment Move into the Mainstream

by DR. JUERG STEFFEN
Dr. Juerg Steffen is CEO of Henley & Partners and author of definitive books on high-net-worth relocation to Austria and Switzerland.

The volatility driven by Covid-19 has pushed the steadily growing appeal of investment migration seen over the past two decades into overdrive. While the surge in interest shown by citizens of emerging economies and politically precarious states is somewhat predictable, the big game-changer, accelerated by the coronavirus pandemic, has been the exponential spike in interest from nationals of highly developed countries — and in particular Canada, the UK, and the US.

During the height of the initial lockdown, in the third quarter of 2020 Henley & Partners experienced an average increase of 45% in general enquiries compared to the same period in 2019. Remarkably, yet understandably, the most stratospheric growth globally has been in the US. By late 2020, Henley & Partners had seen an astonishing 235% spike in enquiries from US citizens since the start of the pandemic compared to the same period in 2019, with 74% more enquiries from Canadian citizens, and a 38% rise in enquiries from UK citizens. Another interesting shift was the 25% increase in the number of high-net-worth individuals (HNWIs) enquiring about citizenship-by-investment as opposed to residence-by-investment programs, indicating that wealthy international investors were planning for the option of a permanent change should the need arise.

> *“Covid-19 has certainly acted as a driver of growth, putting a spotlight on the many benefits of strategic residence and citizenship planning.*

Covid-19 has certainly acted as a driver of growth, putting a spotlight on the many benefits of strategic residence and citizenship planning. However, even during the two years preceding the outbreak of the pandemic we had already seen positive developments, with investment migration maturing from being a luxury lifestyle product to a sophisticated investment choice. More than being associated with simple ease of travel or acquiring a vacation home as in the past, alternative residence and citizenship are now also perceived in terms of their remarkable potential for portfolio diversification, access to global investment and operations, and the creation of a new inheritance and identity for the family. The unexpected and unprecedented events of 2020 have simultaneously exacerbated push factors such as political and economic instability, and reprioritized pull factors, with stability, safety, and access to education and healthcare becoming issues of greater concern than ever before.

What has become clear is that savvy investors have begun to realize that diversification is as relevant to lifestyle planning as it is to wealth management. By spreading their assets across a range of markets and jurisdictions, over time they are more likely to harvest returns than if they hedge their bets on one country alone — even if that is a world-leading nation. Having been locked down for months, many of us have considered making a fresh start in a different place. No longer bound to physical offices in urban city centers, wealthy individuals began to explore options to relocate to entirely new countries, from where they would be able to continue operating their businesses while living a better life in a place where they and their family would feel more comfortable and secure.

In tandem with the rising number of enquiries from citizens of leading developed nations is the constant and steadily growing interest shown by citizens from emerging market countries. Emerging economies have advanced impressively over the past two decades, and economic power has increasingly shifted towards these regions, but while these markets abound with opportunities in the form of a rapidly rising middle class, higher consumption, and attractive returns, the downside is that there are as many (if not more) risks, such as political and economic instability, inferior infrastructure, and poor market access.

Kenya has seen tremendous growth in enquiries of 116% between 2019 and 2020, while India saw growth of 61% off an already high base in the same period.

The past few years have seen many affluent individuals from emerging markets across the world transcending the historical constraints imposed on them and accessing business, career, educational, and lifestyle opportunities on a global scale, for themselves and their families, by investing in residence or citizenship programs. We expect to see these numbers continue to climb in 2021 and beyond as the prevailing political and economic uncertainty that has unfortunately been intensified by Covid-19 prompts even more international investors to plan their next move.

> *“...investment migration is now very much a mainstream advisory service for HNWIs and ultra-HNWIs.*

When combined with over a decade of growth in engagement from both the buy and the sell sides, it is fair to state that investment migration is now very much a mainstream advisory service for HNWIs and ultra-HNWIs. The value offering for investors and their families as well as sovereign states and their citizens is now very clear. Furthermore, the volume has reached a critical mass to a point where it is reasonable to suggest that investment migration has become a standard consideration for international HNWIs who are looking to hedge volatility and create short-term value as well as long-term yield through enhanced global mobility.

As client advisors, we are now seen, treated, and understood as being on a par with other professional advisors to HNWIs such as lawyers, bankers, and wealth and investment management professionals. However, there is a final frontier that we as an industry have yet to embrace before we can be fully accepted and seen by all our stakeholders as a mainstream advisory service: Enhanced regulation. When the first modern investment migration programs were developed in the late 1980s and early 1990s, the industry was largely unformed, and unregulated. The volume of capital deployed in investment migration was far lower. Today, however, with an annual market estimate of USD 20 billion circumstances are very different. Investment migration involves the international transfer of billions of dollars of liquidity and is defined by the core aspects of sovereignty — the right to bestow residence and/or citizenship. Combine the two and it is entirely understandable that global civil and political society would expect those in the value chain to be regulated.

The reality of the situation is that a significant percentage of participants in investment migration are regulated, albeit partially indirectly. Lawyers and financial service providers that are involved in the process are all subject to at least one regulatory regime depending on the nature of their operations. For instance, the transfer of capital to complete the investment process has to be processed through banks that are subject to both local and international regulatory oversight.

However, to take regulation to the next level requires the development of a regulatory vision that is specifically designed for the investment migration advisory practitioner. This is why Henley & Partners is such an active supporter of the Investment Migration Council. It is only through collective engagement with sovereign and supranational authorities that the investment migration industry will earn the necessary trust to help create a robust regulatory regime — one that will ensure that any investment migration practitioner adheres to the highest possible standards, wherever they are based and whatever program they are licenced to market.

Henley & Partners has already invested significant time and capital in a corporate structure that has governance at its heart. We are entirely confident that our model, which includes internal due diligence and audit capabilities, can form a blueprint for the wider industry to emulate.

Offering residence or citizenship in return for investment is mutually beneficial for successful applicants and their destination countries. Investors ‘buy into’ a country, bringing valuable debt-free capital that can be used to create monetary and fiscal autonomy or be invested in vital infrastructure, or both. Moreover, investors bring international skill sets and experience, which can diversify the economies of host countries, thereby creating positive options for all members of society.

At Henley & Partners, we call this mutually beneficial dynamic 'sovereign equity'.

Inflows of funds from investment migration programs can be considerable, with extensive macroeconomic implications. Foreign direct investment increases the value of the receiving state, bringing capital to the public sector in the form of donations to the government, tax payments, or treasury bond investments, and to the private sector as investments in businesses, start-ups, or real estate. The economic benefits are cumulative. Receiving states may experience growth in their real estate sectors, construction industries, and local businesses; increased liquidity in their commercial banking systems; employment growth; the creation of new revenue streams through duties and taxes on imported goods; increased hotel-room supply, greater air traffic, a rise in tourism, and associated tax and spending benefits.

For international investors, having options has become an essential part of any family's insurance policy for the 21st century, particularly in times of uncertainty, and acquiring an alternative residence or citizenship enables greater flexibility and access to the leading economies of the world. This was the case before Covid-19, and it is even more so now. The more jurisdictions a family has access to, the more diversified its assets and the lower its exposure to both country-specific and global volatility will be. On the supply side, the range of investment migration products and options is likely to expand even further in the wake of Covid-19 as more sovereign states explore their unique ability to endow themselves with a source of sustainable revenue without increasing debt, which can burden future generations.

Necessity has seen the investment migration industry prevail, and with global demand and supply continuing unabated and tighter regulation in 2021 and beyond, investment migration will remain a firmly established mainstream player.

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PANDEMIC MIGRATION
Nationalism, Mobility, and Citizenship in the Covid Era

by PROF. PETER J. SPIRO
Prof. Peter J. Spiro is Charles Weiner Professor of Law at Temple University Law School.

The Covid-19 pandemic proved the first major blow to the post-globalization system of mobility. The lockdown reinforced national identities as many individuals returned to their homelands. Constraints on international travel have also temporarily reduced the value of mobility privileges for many. But the fallout from the pandemic will ultimately accelerate pre-existing trends towards citizenship acquisition as transnational elites look to insure against future shock events.

As almost all countries moved to shut down their borders in an attempt to prevent the virus from coursing its way across the world, waves of people boarded planes to return to their homelands. These were not just interrupted vacations but the interrupted lives of individuals working, studying, and otherwise living abroad. For the most part, those who traveled in these fretful circumstances were going home to places in which they had citizenship, but not just citizenship — home in the sense of their primary sentimental ties.

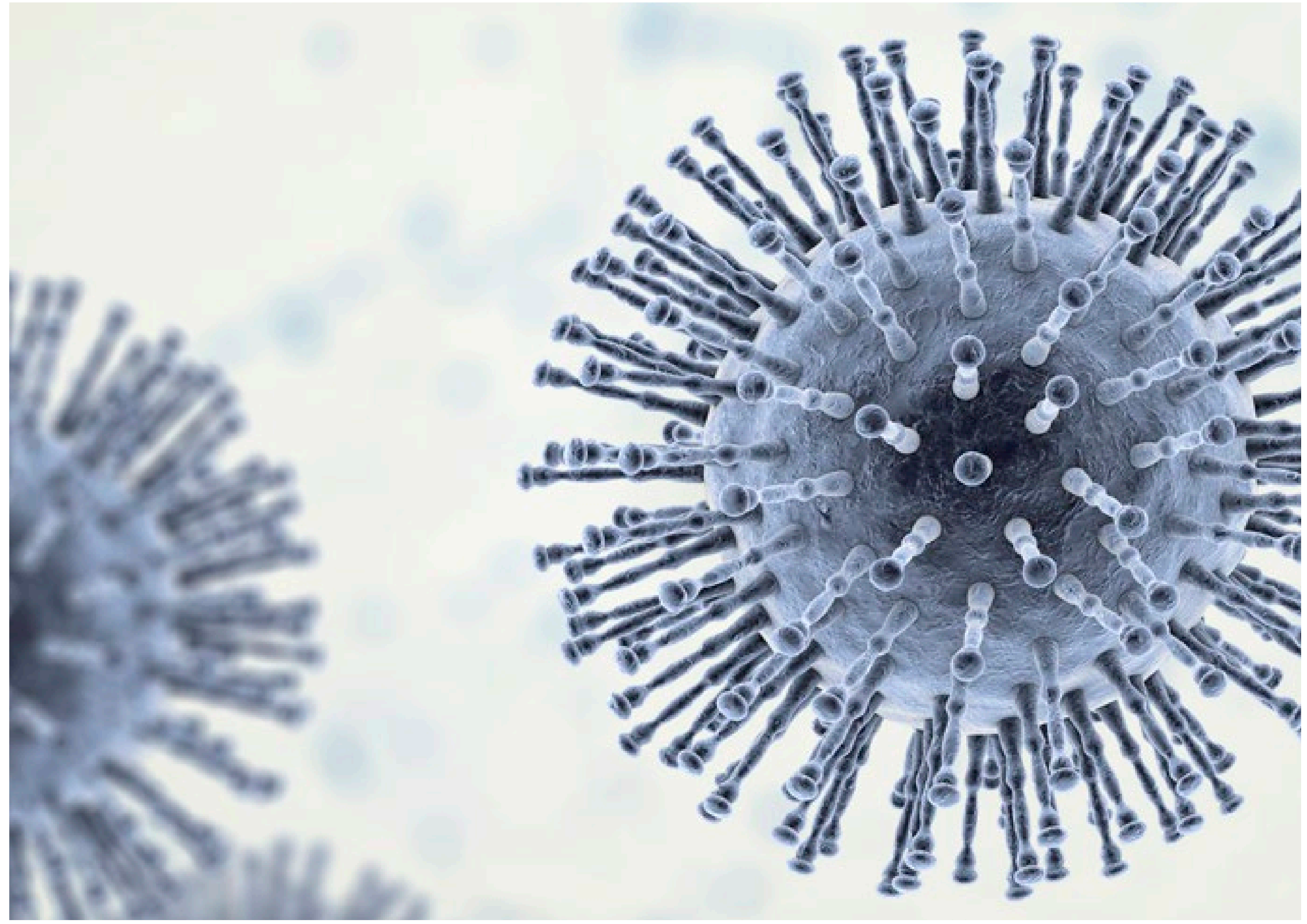
> *Citizenship has guaranteed a right of entry into the country in which that citizenship is held. That right has perhaps been taken for granted in the wake of globalization…*

That shows the continuing importance of citizenship in its conventional understanding. Citizenship has historically been about where a person is 'from'. Citizenship did not concern itself much with third-country mobility privileges. Citizenship has guaranteed a right of entry into the country in which that citizenship is held. That right has perhaps been taken for granted in the wake of globalization, at least with respect to affluent individuals who have enjoyed substantial global mobility privileges. Where your passport was from was of little significance as long as it was premium class.

That changed with Covid. US passport holders, accustomed to traveling the world obstacle free, are now welcome in only a handful of states. The spectacle of a group of Americans who are not accustomed to being stopped from going anywhere being turned away from Sardinia after arrival on their private jet exemplified the shift. As Covid spread, almost all states allowed the entry of their citizens at the same time as they clamped down almost completely on the entry of others.

> *…Covid is making people feel their citizenship more than before. But Covid is also giving people more reason to secure additional citizenships.*

So Covid is making people feel their citizenship more than before. But Covid is also giving people more reason to secure additional citizenships. Holders of premium citizenships now have an incentive to secure additional citizenships. The Americans barred from entering Sardinia can, for instance, follow the example of their compatriot and Google founder Eric Schmidt, who applied for Cypriot citizenship, and seek alternatives. Others will consider additional citizenships as a kind of health insurance against future pandemics. The incidence of Covid-19 in Malta has been relatively low, and New Zealand has managed the pandemic extremely well. Both countries have a pathway to citizenship for investors. Investment citizenship is restricted to the very rich, but financial mortals can also acquire other citizenships through the luck of ancestry, or marriage, or other eligibility factors, and they will now have a reason to pursue it.



States, meanwhile, will have no incentive to clamp down on instrumentalized citizenship. Before Covid, they were already far along a path towards universal acceptance of dual citizenship, a key element in instrumentalized citizenship, and there are no signs that this acceptance will be reversed.

The growing number of people who were enjoying globalized lives are probably going to want to resume those lives sooner or later. With the distribution of effective vaccines, travel restrictions will ease, and interstate mobility will return. Citizenship may still hold great meaning in its traditional conception as a marker of home, but increasing numbers will be acquiring additional citizenships to protect their global privileges in the post-Covid era.

> *…increasing numbers will be acquiring additional citizenships to protect their global privileges in the post-Covid era.*

TALENT MIGRATION
Digital Visas Disrupt and Intensify the Race for Human Capital

by GREG LINDSAY
Greg Lindsay is Director of Applied Research at NewCities.

If 2020 was anything to go by we are likely to see an even more dramatic global shakeup in the league tables of choice destinations in 2021. In late November as the pandemic's second wave crashed across the global north, *Bloomberg* unveiled its Covid Resilience Ranking of "the best and worst places to be in the coronavirus era". The index formally acknowledged what 2020 had made abundantly clear to the world's upwardly mobile: Advanced economies such as the UK and the US had been repeatedly overwhelmed by infections. Meanwhile, other countries — even developing nations — defied expectations. For these and other once-desirable destinations such as Spain, Sweden, and Switzerland, this was an admission of defeat.

Bloomberg's ranking, which cross-references quality-of-life metrics with post-pandemic measures such as positivity rates, lockdown severity, and mobility, underscores that for those with the means, we are all 'global nomads' now. Originally coined to describe a subset of technology workers drawing Silicon Valley salaries while camped in Chiang Mai or Bali, the moniker now effectively describes anyone with a Covid-induced mandate to work from anywhere — and thousands, if not millions, are pursuing pandemic arbitrage in their choice of destinations. The early evidence is clear, including record numbers of Americans who sought secondary citizenship in 2020, and Britons who rushed to secure EU access on the eve of Brexit.

> "…for those with the means, we are all 'global nomads' now.

But even as individuals choose to vote with their feet (and passports), the cracks are beginning to show in terms of global governance when it comes to attracting talented migrants. For instance, the European Commission has curiously chosen this moment to bring down the hammer on Malta's and Cyprus's investment migration programs, while hinting that Portugal's and others' real estate-driven 'golden visas' might be next on the chopping block. Meanwhile, this past year has seen the advent of a lightweight national alternative to secondary citizenship in the form of 'nomad visas', which entitle one to live and work in Europe's Schengen Area for a year or more — so long as you earn offshore and spend locally.

> "…what began as a long-mooted evolution of Estonia's e-residency program, which was launched in 2015, rapidly evolved into an arms race to attract talent — with some havens safer than others.

During the height of the 2020 lockdown, what began as a long-mooted evolution of Estonia's e-residency program, which was launched in 2015, rapidly evolved into an arms race to attract talent — with some havens safer than others. First-mover Barbados was quickly joined by Bermuda, Anguilla, Antigua, Costa Rica, Mexico, and the Cayman Islands in the Caribbean; in Europe, Estonia was followed by Georgia, Germany, Spain, Portugal, the Czech Republic, and Norway, with Croatia close behind, along with Dubai, as part of its reforms to make itself more attractive to Western workers. In each of these cases, visas might cost two-, three-, or four-figures dollar-wise, with corresponding income guarantees.

But with vaccinations now underway, the question is how the programs will evolve to exploit post-pandemic uncertainty and opportunity on the far side of the crisis. For example, while the nations mentioned above hedge their bets through low-cost, lightweight visas, the US will struggle under the Biden administration to reverse the damage of President Trump's decision to temporarily suspend the H-1B program, which may have shaved as much as USD 100 billion off the market caps of America's largest tech stocks by starving them of labor at a critical juncture.

In an indirect response, the Canadian federal government under Prime Minister Justin Trudeau announced plans to increase post-pandemic immigration to levels not seen in a century as part of an explicit economic strategy to revitalize the country. Nations around the globe are facing the same dilemma — how best to beggar my neighbor in terms of talent, both during and after the pandemic?

In light of these trends — the commingling of health and wellbeing, the crackdown on investment migration, and the race for talent — further upsets are highly likely, and perhaps it is high time for Thailand and Vietnam to outshine France and the US. As a start.

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CLIMATE MIGRATION
Planning for Human Migration Due to Climate Change Must Top the Global Agenda

by CHARLES PHILLIPS
Charles Phillips is an independent researcher and consultant for Oxford Business Group whose field of expertise is energy and climate change policy in the Middle East.

Preparing for likely patterns of global and national migration impacted by climate change will continue to be a high priority in 2021 and beyond. The phenomenon of climate-induced migration has increasingly come to the attention of the international community over the past few years. This follows repeated warnings from international bodies that major disruptive migration patterns will be experienced by countries worldwide if long-term and holistic action is not taken to address climate change. The UN-sponsored Intergovernmental Panel on Climate Change has estimated that the single greatest impact of the climate crisis may be human migration caused by the environmental consequences of climate change: shoreline erosion, coastal flooding, and agricultural disruption.

This comes at a time when the adverse effects of climate change are projected to worsen, despite the economic fallout from Covid-19. A UN-backed report, *The Production Gap Report: 2020 Special Report*, projects coal, oil, and gas production will grow this decade despite the dip caused by the pandemic. Growth in fossil fuels will lead to a significant increase in CO_2 emissions, which cause and intensify climate change. The report projects a 2% annual rise in global fossil fuel output this decade, at a time when annual emissions cuts of 6% are needed to reach the 1.5 C warming limit — an ambition of the Paris Agreement of 2015.

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> *We do know that climate change amplifies existing migration pressures and drivers…*

The challenge of estimating how many people climate change displaces, or will displace, is limited by a lack of monitoring. We do know that climate change amplifies existing migration pressures and drivers in addition to causing immediate displacement due to catastrophic climate-related weather events. The latter are occurring more frequently and more intensely due to climate change. As such, the Internal Displacement Monitoring Centre (IDMC) has noted that mass displacement triggered by extreme weather events is becoming the norm and in 2019, natural disasters caused 24.9 million people to leave their homes.

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> *…mass displacement triggered by extreme weather events is becoming the norm…*

One issue that has impeded government action on climate migration is that environmental migrants and environmental or climate refugees are not well defined in international law. The current legal definition for a refugee is based on the 1951 UN Refugee Convention which categorizes a refugee as a person forced to flee due to persecution of race, religion, nationality, social, or political affiliation. This does not include people who are forced to flee due to loss of livelihood or habitat. To address this issue, the International Organization for Migration has adopted ‘climate-displaced persons’ (CDPs) as its preferred term.

There are a number of measures that can address the plight of CDPs that can be divided into four broad categories.

Firstly, mitigation of the climate change factors that might displace people will help to reduce the number of CDPs. Secondly, adaptation within countries where it is possible to do so will help to increase the capacities of environmentally vulnerable populations to remain in their places of origin. This will involve planning and capacity building for adaptation strategies such as land management, lessening the vulnerability of houses, and reducing peoples’ exposure to environmental hazards. However, pursuing adaptation strategies is challenging in the face of limited resources and widespread poverty. As such, the Paris Agreement calls for rich countries to finance adaptation for developing countries.

Thirdly, internal relocation as a part of the adaptation process will be required where localized adaptation is not possible. This will require significant strategic planning and capacity building to prepare for internal migration. Finally, it will be necessary to plan for a certain amount of international resettlement, including pathways for regular migration. This will relate more to refugees and exceptional circumstances, including individuals who cannot be relocated within their home countries due to either large scale destruction or potential conflict if they move internally, and whole populations of islands who may lose their homes. In the face of such a critical climate outlook, the choice of taking urgent action is now no longer an option, it is a must.

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FORCED MIGRATION
Covid-19 Exacerbates Vulnerability of the Forcibly Displaced

by LORRAINE CHARLES
Lorraine Charles is a Research Associate at the Centre for Busines Research at the University of Cambridge.

After a year that will be remembered in history as transformational, when the ways in which we live and work were altered, perhaps the biggest change has been in the movement of people. With border restrictions expected to extend well into 2021 and the ongoing political instability in many countries, mobility of the most vulnerable will continue to be impeded — a situation that could lead to loss of life, not only from Covid-19, but also due to an inability to access basic necessities.

International and domestic travel were drastically restricted, with the majority of the world's population locked indoors. For millions of forcibly displaced individuals and families, 2020 compounded their already challenging existence. Looking ahead to 2021, the numbers of forcibly displaced and those in need of urgent humanitarian assistance are likely to increase considering the current public health crises caused by Covid-19 as well as the political and economic fragility in many parts of the world. According to UN High Commissioner for Refugees (UNHCR) data, there are over 79 million forcibly displaced people, of which 26 million are refugees. Contrary to some media portrayals of refugees, 84% live in developing countries, and seven out of the top ten developing countries that host refugees are considered fragile according to the OECD. Moreover, refugees often settle into host communities that are among the poorest in their countries, with inadequate public services. It stands to reason then that with already fragile economic and health systems, the outbreak of Covid-19 has had an even greater impact on the most vulnerable.

> "
> *...there are over 79 million forcibly displaced people, of which 26 million are refugees.*

Yet, while much of the developing world swiftly instituted lock-down measures, preventing the huge losses of life and transmissions experienced by the US and Europe at the beginning of 2020, in the latter half of 2020 high population densities in both urban areas and refugee camps saw many communities experiencing increasing local transmissions of Covid-19. Zaatari Refugee Camp in Jordan reported its first death from Covid-19 on 11 November 2020, and the first local transmission in Gaza was reported in August 2020.

Perhaps the most significant impact Covid-19 has had on the forcibly displaced has been on mobility. UNHCR and the International Organization for Migration (IOM) temporarily suspended their resettlement on 17 March 2020 due to travel restrictions and to reduce refugees' exposure to the virus. The US — traditionally the largest recipient country for resettled refugees — under the outgoing Trump administration continuously reduced its resettlement quotas starting in 2017. In October 2020, the US Government announced a cap of 15,000 resettlement spaces for the upcoming year (compared to 110,000 under the Obama administration). According to UNHCR, 2020 may well record the lowest number of refugees resettled. As well as a significantly reduced global refugee quota of 50,000, current rates indicate the lowest levels of resettlement in almost two decades. Between January and September 2020, only 15,425 refugees were resettled compared to over 50,086 in the same period in 2019, increasing vulnerability and putting many at risk of falling further into poverty. Many are hopeful that resettlement numbers will rise again in 2021 given the new US administration's commitment to increasing annual refugee resettlement quotas as well as the growing number of complementary pathways for regular migration, such as those offered by the UK, which has opened more channels for skilled refugee migration.

Covid-19 has also caused many displaced individuals to return to their home countries, often back to the difficult and precarious conditions they fled from and where they lacked basic necessities. By 30 October 2020, more than 136,000 Venezuelans had returned from other countries in the region. At its peak, an average of 600 Venezuelans returned from Colombia and 88 from Brazil daily. Between 1 April and 3 November 2020, IOM had assisted more than 37,600 migrants who had returned to Ethiopia from neighboring African countries and Saudi Arabia. Despite the constraints on global movement, many individuals displaced by violence and political instability continued to embark on dangerous journeys in the hope of safety and a better life. The Covid-19 responses of destination countries have increased the risks and uncertainty of these journeys, putting many people in dangerous situations where humanitarian support and rescue may be unavailable. According to IOM, by 21 November more than 2,700 people had lost their lives during migration in 2020.

A safe and effective vaccine may see a resumption of global travel and a return to 'life as normal' in the year ahead, but for displaced individuals and their families, 'normality' will continue to be fraught with danger and distress.

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MIGRATION AND MOBILITY IN THE AMERICAS

Immigration Landscape Remains Unclear Despite Biden Win

by PROF. WILLIAM R. KERR

Prof. William Kerr is the D'Arbeloff Professor of Business Administration at Harvard Business School.

The election of Joseph Biden allows many proponents of immigration to breathe a collective sigh of relief. But global migration will not restore itself immediately, and much uncertainty persists over the future of immigration to the Americas as well as within the region.

As I discuss in *The Gift of Global Talent*, the US owes much of its economic strength to immigrants. America has historically enjoyed a significant advantage from global talent flow — for example, receiving 57% of inventors moving globally during 2000–2010. Immigrants run Fortune 500 companies and provide a quarter of patents and new start-up companies. The proportion of immigrants has grown from being about 5% of the US population in the 1970s to nearly 15% today, enlarging the young talent pool during a time of population aging. Yet, the Trump administration worked to restrict immigration to America on all fronts.

> "
> *...Biden's campaign platform was far from a case for open borders.*

Biden can immediately start to unwind restrictive immigration policies instituted by Trump through executive action, and he has declared his intention to do so around enforcement and asylum seekers. He has been less clear on skilled immigration. While he has proposed increasing the cap on H-1B visas and creating new types of immigrant visas, these reforms hinge on Democratic control of Congress. Immigration policy will instead revolve around regulatory action. Biden will likely ease some policies, such as the ban on admitting new green card or H-1B holders during the pandemic. However, Biden's campaign platform was far from a case for open borders. He endorsed some protective policies such as limiting visas during recessions and protecting American workers' wages.

The trend towards easier mobility is also unclear in the rest of the Americas. Canada discusses expanding immigration further, and South America's highly developed regional integration processes, like the MERCOSUR Residence Agreement, have withstood even the Covid-19 pandemic. Some countries have eased residency rules, as Colombia and Peru did for Venezuelans as recently as October 2020. Yet restrictive approaches show signs of gaining momentum across the region as countries debate changes to the long-term status of migrants.

Whatever specific positions ultimately emerge in the US, Biden wants to rebuild the trust and confidence of global talent in America, which is essential. US immigration has never been 'user friendly', but America enjoyed the gift of global talent due to the appeal of the country. Trump badly damaged that confidence, and would-be immigrants are now keenly aware of how quickly the US can become unwelcoming. Biden's support will be a refreshing change, but many politicians remain skeptical of immigration. As long as America's political leaders remain incapable of reaching compromise on immigration, uncertainty will persist to the detriment of the country and region.

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MIGRATION AND MOBILITY IN ASIA PACIFIC

Agile Region Looks Set to Be First to Emerge from Covid Crisis

by CURTIS S. CHIN

Curtis S. Chin is a former US Ambassador to the Asian Development Bank, the inaugural Asia Fellow of the Milken Institute, and managing director of advisory firm RiverPeak Group, LLC.

First to suffer the health and economic consequences of the coronavirus pandemic, the Asia Pacific region also remains on target, as 2021 begins, to include some of the first countries to recover. This is good news for would-be investors and expats looking to return to what has long been the most dynamic economic region in the world.

Mainland China was the first major economy to see a return to growth after putting in place some of the world's most stringent lockdowns. By September 2020, with the Covid-19 crisis having had a devastating impact on international air connectivity, China boasted the first four of the top five "most connected" cities — Shanghai, Beijing, Guangzhou, and Chengdu, followed by Chicago — according to the International Air Transport Association. Incidentally, London, the world's most connected city in September 2019, saw a 67% decline in connectivity and had fallen to 8th position.

The prospects are also looking relatively bright for several other Asia-Pacific destinations where governments did not resort to the heavy-handed controls implemented by Beijing. A November 2020 Bloomberg analysis and ranking of the best places to be in the coronavirus era — namely, where the virus has been handled most effectively, with the least disruption to business and society — included New Zealand, Japan, Taiwan, South Korea, Australia, China, Vietnam, Singapore, Hong Kong, and Thailand among its top 15 "Covid resilient" economies of more than USD 200 billion.

In the same rankings, however, India and the Philippines were among those economies that fared considerably worse, echoing the disparity that underscores the unequal challenges faced by governments across the region and the discrepancy in resources available to them as they struggle to balance health and economic concerns. Vigilance remains essential across Asia and around the globe, including surrounding 'lockdown fatigue' that could well lead to another wave of infections and extended restrictions on mobility. Yet the drive and innovativeness that contributed to the growth of numerous Asian economies in recent decades also augurs well for the future, as nations now explore safe 'travel bubbles' and 'travel corridors' and introduce new long-term visa programs for investors.

One clear innovator is the key travel and transit hub of Singapore, which in November 2020 announced a new work visa for foreign executives of technology firms, a sector the low-tax international business hub hopes will power future economic growth.

In the same month, speaking at TravelRevive — an event in Singapore described as the first international trade show to be held physically in Asia Pacific since the coronavirus outbreak — Singaporean Trade and Industry Minister Chan Chun Sing stated that whoever could ensure visitors' health (and) security in a faster and better way would gain a competitive advantage. Chan added that Singapore recognizes it has scope to establish itself as a safe, secure meeting place for business amid Covid-19 and the dynamic city state has every intention of being among the leading lights in the area.

Creativity and competitiveness paired with a willingness to embrace innovation and adapt new technologies could well lead to large parts of Asia Pacific being both first in and first out of these difficult times.

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MIGRATION AND MOBILITY IN EUROPE
Movement Will Remain Constrained Until Vaccines are Widely Available

by PROF. SIMONE BERTOLI
Prof. Simone Bertoli is Professor of Economics at Université Clermont Auvergne (CERDI) and a Research Fellow at the Institute of Labor Economics.

The Covid-19 pandemic remains highly active as we enter 2021, despite stringent containment measures widely introduced across many parts of the world in the last quarter. Cross-border mobility is at an historic low, and the prospects for the next few months remain extremely uncertain.

Unlike during the first lockdown last year, EU citizens can now move across countries in the bloc, but travelers still face major obstacles. These range from a mandatory negative viral test, to compulsory quarantine periods, to the dramatic decline in the number of flights available. The International Air Transport Association's Travel Pass should assist passengers to navigate the jungle of country-specific requirements and restrictions and facilitate the exchange of information on the health status of travelers across countries, but fluid movement within the Schengen Area is unlikely to be restored until vaccines are widely available to the European population.

The second major difference now is that European countries appear to be making a greater effort to coordinate certain decisions, compared to during the first wave of the pandemic, when in March 2020 the EU seemed to be on the verge of dissolution. The EU-level recovery plan and the major role the European Commission has played in liaising with pharmaceutical companies to secure access to vaccines and roll out a mass vaccination campaign to eventually inoculate some 450 million people in 27 member states against Covid-19 have effectively reminded European governments of the importance of coordination.

This collaborative approach gives reason for optimism about the ability of European countries to rapidly dismantle the restrictions currently depriving their citizens of free movement within the Schengen Area once a substantial proportion of the population has been vaccinated.

> *"...European countries appear to be making a greater effort to coordinate certain decisions, compared to during the first wave of the pandemic, when in March 2020 the EU seemed to be on the verge of dissolution.*

Previously scheduled to come into effect in 2021, European authorities also recently announced that the European Travel Information and Authorization System (which will be used to keep track of visitors from countries who do not require a visa to enter the Schengen Area) will only be launched towards the end of 2022 and will not be mandatory until 2023.

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MIGRATION AND MOBILITY IN THE UK
Britain Finally Brexits, but Uncertainty over UK–EU Mobility Persists

by MADELEINE SUMPTION
Madeleine Sumption is Director of the Migration Observatory at the University of Oxford.

The joint impact of Covid-19 and the post-Brexit immigration system make it very difficult to predict what mobility between the UK and Europe will look like in the future — particularly this year, but also for several years to come.

Under the new system, EU citizens coming to the UK to live or work will need to qualify in the same way as non-EU citizens, applying for a visa for work, family, or study. Most EU citizens will no longer be eligible to migrate to the UK to take up low-wage jobs — a major change for UK employers, who have become quite dependent on a steady inflow of EU workers over the past 20 years.

In contrast to free movement, workers who are eligible to move will require an offer of a skilled job with a salary of at least GBP 25,600 for most jobs, and proof of their language skills. They will also have to navigate the new bureaucracy and pay hefty Home Office fees (a non-EU citizen currently pays around GBP 7,000 in fees from initial entry to settlement, and possibly an even higher amount depending on the visa type). For those EU citizens who do have the financial resources, we may start to see more interest in the UK-Tier 1 Investor Visa, which frees applicants from some of the restrictions that come with other permits.

> *"...mobility is likely to be suppressed for some time into 2021.*

How many people will take up their options to move under the new system is hard to predict. With Covid still raging in the UK, travel bans and quarantines, and the deep economic contraction resulting from the pandemic, mobility is likely to be suppressed for some time into 2021.

MIGRATION AND MOBILITY IN THE MIDDLE EAST
Diplomacy, Conflict, and Crises See Mobility in Flux

by DR. ROBERT MOGIELNICKI
Dr. Robert Mogielnicki is a Resident Scholar at the Arab Gulf States Institute in Washington, where he manages the institute's political economy research.

New diplomatic openings, simmering conflicts, and ongoing crises are reshaping the Middle East's migration and mobility landscape. In September 2020, the UAE and Bahrain established formal ties with Israel as part of a US-brokered agreement. The two Gulf Arab states and Israel subsequently arranged for direct flights and visa-free travel.

A strong technology focus weaves together the economic agreements and memorandums of understanding that emerged in the wake of the UAE–Israel normalization agreement. Sudan normalized relations with Israel in October 2020, and other Arab countries may take similar steps over the coming months.

The Gulf Cooperation Council rift of 2017 has forced Qatar to manage an ongoing diplomatic and economic boycott from Bahrain, Egypt, Saudi Arabia, and the UAE. Qatar continues to rely heavily on Iranian airspace, heightening political risks associated with the country's air transportation sector. Saudi Arabia and Qatar may resolve key elements of the dispute in 2021; however, improving Qatar–UAE relations presents a larger obstacle. Meanwhile, an unofficial Saudi boycott of Turkish goods has exacerbated Saudi–Turkish tensions. The number of Saudi tourists visiting Turkey annually had decreased by 24% in 2019, after the murder of Saudi journalist Jamal Khashoggi in Istanbul increased tensions. Fewer Saudi tourists are likely to travel to Turkey once coronavirus-related travel restrictions ease.

An incoming Biden administration is expected to apply greater pressure on Saudi Arabia to draw down its military involvement in the Yemeni Civil War. However, Saudi Arabia's weakened fiscal position complicates its capacity to fund post-conflict stabilization and reconstruction efforts needed in Yemen.

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> *Sudan normalized relations with Israel in October 2020, and other Arab countries may take similar steps over the coming months.*

A prolonged economic crisis, the tragic explosion at the port of Beirut, and chronic government mismanagement in Lebanon have precipitated an exodus of Lebanese citizens and foreign residents from the country. Those unable or unwilling to leave confront an imploding economy.

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MIGRATION AND MOBILITY IN RUSSIA AND THE CIS
Geopolitics, Domestic Upheaval, and Conflict Will Continue to Disrupt Mobility

by RYHOR NIZHNIKAU
Ryhor Nizhnikau is a Senior Research Fellow at the EU's Eastern Neighbourhood and Russia program at the Finnish Institute of International Affairs.

The factors that saw 2020 become a ‘perfect storm’ for Russia and the CIS region will continue to shape mobility in 2021. The traditional regional drivers — EU–Russia geopolitical competition and domestic vulnerabilities — were aggravated by new developments that jeopardized stability and disrupted mobility flows.

First, the Covid-19 pandemic significantly upended mobility in the region. Existing visa-free agreements were suspended and access to key labor and travel destinations were restricted. Second, socio-economic and political tensions of varying scales erupted across the region, including the humanitarian and financial crisis for Central Asian migrants, electoral crises in Georgia and Kyrgyzstan, the popular revolt in Belarus, and the Nagorno–Karabakh war. Consequently, domestic upheavals increased geopolitical tensions and migration pressures on neighboring states. For instance, in late 2020 Belarus and Russia jointly accused western countries of interfering in Belarus's domestic affairs, while thousands of Belarusians have fled the country since August 2020.

It is expected that when the pandemic crisis begins to ease there will be a gradual removal of temporary restrictions and normalization of travel and labor migration. However, the conflict between Russia and the West will continue to curb the potential for improvements in mobility. The Belarusian crisis is likely to remain unresolved, which may further destabilize the region and even cause EU–Russia relations to deteriorate. China's geo-economic presence will expand, particularly in Ukraine and Uzbekistan.

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> *China's geo-economic presence will expand, particularly in Ukraine and Uzbekistan.*

In these circumstances, Ukraine is a country to follow. It will regain visa-free travel to the EU and gain access to several new destinations. A demand for labor in Central Eastern Europe and Germany will continue to increase, which will trigger further migration outflows. More importantly, its booming trade with China and proactive attempts to expand its role in the Belt and Road Initiative and boost political and economic cooperation with Asia will create new risks and opportunities.

MIGRATION AND MOBILITY IN AFRICA
New Free Trade Area Will Be Key to Recovery and Growth

by JUSTICE MALALA
Justice Malala is an award-winning journalist, newspaper columnist, author, and entrepreneur.

Political tensions and economic stresses exacerbated by lockdowns will continue to drive migration trends across Africa in 2021. Conflict in Ethiopia's Tigray region saw more than 40,000 refugees arrive in the Sudan, Eritrea, and Somalia, creating long-term negative consequences for Africa and southern Europe. On the other hand, there are silver linings.

Although 2020 ended with the outgoing administration of US President Donald Trump issuing a new, temporary rule requiring tourist and business travelers from 24 countries — most in Africa — to pay a bond of up to USD 15,000 to visit the US, 2021 commences with some positive developments in global mobility for Africans. US president-elect Joe Biden has vowed to rescind Trump's travel bans on travelers from 13 countries, most of them either majority-Muslim or African nations.

Travel restrictions are mostly being lifted across the continent, and this combined with the first approval and planned deployment of Covid-19 vaccines bodes well for the implementation of the African Continental Free Trade Area (AfCFTA) in 2021 after the pandemic delayed the planned launch in July last year. AfCFTA aims to bring together 1.3 billion people in a USD 3.4 trillion economic bloc, creating a single market for goods and services in addition to a customs union with free movement of both capital and business travelers.

The roll-out of the new African Union passport is also set to take place in 2021. Also stalled by the pandemic, this initiative is crucial for AfCFTA's success as it will ease travel within the continent. So far, only government leaders, diplomats, and AU officials have been issued with the passport.

Struggling economies, high crime rates, and political instability in many parts of the continent will continue to drive wealthy individuals to invest in second passports that will allow them greater mobility to conduct business more effectively across the globe.

> *"AfCFTA aims to bring together 1.3 billion people in a USD 3.4 trillion economic bloc, creating a single market for goods and services in addition to a customs union with free movement of both capital and business travelers.*

For example, reports indicate that an estimated 4,000 South African high-net-worth individuals have left the country over the past 10 years, a trend that is being increasingly replicated across the continent.

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MIGRATION AND MOBILITY IN THE CARIBBEAN
Tourism and Investment Migration Innovations to Ease Mobility and Revive Economies

by DR. SUZETTE HAUGHTON
Dr. Suzette Haughton is a Senior Lecturer and Head of the Department of Government at the University of the West Indies.

The most striking developments to watch for in 2021 are further efforts by Caribbean governments to stimulate and facilitate travel. There is perhaps nowhere in the world that relies on tourism and investment migration sectors more than the Caribbean, a region in which tourism alone contributes 33% of GDP and more than 52% of export receipts.

More than 30 million visitors travel to the Caribbean each year, and 413,000 tourism workers are employed in the region — 18.1% of total employment on average. If indirect employment is considered, this rises to around 90% in countries like Antigua and Barbuda. Equally importantly, Antigua and Barbuda, the Commonwealth of Dominica, Grenada, St. Kitts and Nevis, and St. Lucia all see significant revenues from their citizenship-by-investment (CBI) programs. For example, in 2019, the Antigua and Barbuda Citizenship-by-Investment Program generated close to USD 36.8 million.

Although travel restrictions inflicted by Covid-19 have impeded inbound travel, Caribbean authorities are finding solutions to restart the tourism sector and to expand CBI program offerings. In May 2020, St. Lucia introduced a new Covid-19 Relief Bond option in response to the coronavirus pandemic. To qualify, a minimum investment of USD 250,000 in a non–interest-bearing government bond that is held for five years is required. In an effort to revitalize tourism in the Commonwealth of Dominica, the 'Safe in Nature Programme' was launched in October. The government allocated XCD 17.5 million to market and improve access to the island nation and energize the tourism, international transport, and maritime sectors. The establishment of Dominica's Entrepreneurship Visa program is another regional initiative to boost travel mobility and investment. This flagship program is designed to grant investors Dominican residency once they have established business ventures in the Commonwealth of Dominica.

Caribbean island nations have also used long-stay visa options, their relatively low Covid-19 infection rates, their remoteness, and their reputations as luxury destinations to promote increased travel mobility in the region. For instance, Antigua and Barbuda has established the Nomad Digital Residence program, allowing visitors to stay and work remotely from Antigua for up to two years while living on the highly sought-after and well-equipped island. In November 2020, Jamaica launched its Resilient Corridors and Jamaica Cares initiatives, designed to deliver an alternative yet comprehensive, safe, and secure vacation experience. The former creates corridors encompassing the country's main tourism areas where visitors can enjoy vacationing while maintaining the requisite health protocols, and the latter provides a travel insurance and crisis response plan.

In the year ahead we may see the introduction of e-visas prior to visitor arrivals, issuance of visas on arrival at ports of entry, the removal of visa restrictions, and permanent or temporary removal of visa charges — all of which will serve to foster greater travel mobility.

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A Changed World: What the Latest Results Tell Us

by DOMINIC VOLEK
Dominic Volek is Group Head of Private Clients and a Member of the Executive Committee of Henley & Partners

As we embark on a new year, the results from the latest Henley Passport Index give us an opportunity to reflect on the extraordinary upheaval that characterized 2020 and to assess how our world has been transformed. The effects of the Covid-19 pandemic have been felt in every sphere of our day-to-day lives, forcing us to reconsider much of what we might have once taken for granted.

At the beginning of 2020, all indications were that rates of global mobility would continue to rise, that travel freedom would increase, and that holders of powerful passports would enjoy more access than ever before. The global lockdown altered this rosy picture, of course. Even the strongest passports, once seen as golden tickets to visa-free travel in much of the world, were no match for pandemic-related restrictions. As we enter 2021 with most of the world in renewed lockdowns, a sense of unpredictability reigns, but analysis of the latest results from the index allows us to step back and make some assessments about the future of travel freedom.

Without taking temporary pandemic-related restrictions into account, Japan continues to hold the number one spot on the index, with passport holders able, in theory, to access 191 destinations around the world without needing to acquire a visa in advance. This marks the third year that Japan has held the top spot, either alone or jointly with Singapore. Asian countries' dominance of the index now seems fully established: Singapore holds 2nd spot, with access to 190 destinations, and South Korea holds onto 3rd, sharing the spot with Germany, with a visa-free/visa-on-arrival score of 189. This level of Asian dominance is a relatively new phenomenon — over the index's 16-year history, traditionally the top spots have been held by EU countries, the UK, or the US — and it is fascinating to consider how this picture might evolve as Asian countries begin the process of recovering from the pandemic.

Similarly, with the UK and the US facing significant challenges related to the virus, and the passport strength of both countries steadily continuing to erode, it seems clear that the balance of power has shifted. Over the past seven years, the US passport has fallen from the number one spot to 7th place, a position it shares with the UK. Due to pandemic-related travel constraints, travelers from both the UK and the US now face major restrictions from over 105 countries. While the entry bans are temporary (and in constant fluctuation), this striking decline in passport power should be an eye-opener for those who considered US/UK dominance as indestructible. In the UK, Brexit will no doubt continue to influence mobility and passport strength in the coming months, if not years — a decided change in standing for a nation that held the number one spot on the index just six years ago.

> "*...with the UK and the US facing significant challenges...it seems clear that the balance of power has shifted.*

Elsewhere in the Henley Passport Index, the 27 EU member states continue to perform well, as they have throughout the ranking's history. Finland, Italy, Luxembourg, and Spain jointly hold 4th place, with their passport holders able to access 188 destinations around the world (not taking temporary pandemic restrictions into account), while Austria and Denmark are in 5th place. EU countries occupy most of the index's top 10 spots, enjoying unimpeded access to other countries within the bloc as well as a range of destinations around the world. Australia and New Zealand continue to fare very well, as they have through most of the index's history, holding 8th and 7th spots, respectively. Again, looking at the relative success of the two Australasian island nations' pandemic responses, it seems clear that passport holders from both countries will continue to enjoy unimpeded access to most of the globe once coronavirus-related restrictions begin to ease up.

Perhaps understandably, there were relatively few high-profile visa-waiver agreements between countries in 2020, which saw the rankings remain relatively stable. The notable exception to this is the UAE, which continued its remarkable upward trajectory. Despite the pandemic, the country signed a number of reciprocal agreements, including a landmark US-brokered agreement establishing formal ties with Israel, which grants Israeli and UAE citizens mutual exemption from entry visa requirements. The UAE now has a visa-free/visa-on-arrival score of 173 and holds 16th spot on the ranking — a stunning ascent when one considers that in 2006, the country was placed 62nd on the ranking, with a score of just 35.

No other country has scaled the index quite like the UAE has over the years, but there have been many other successes, such as the notable gains made by certain post-Soviet states. Ukraine, for instance, has extraordinarily climbed up the rankings by 22 places over the past 10 years and now sits in 41st position, with passport holders able to access 130 destinations around the world (not taking pandemic-related restrictions into account). Experts suggest that Ukraine's ascent will continue, given the country's strengthening bilateral trade relations with China, which will have implications for its relations with other countries involved in the Belt and Road Initiative.

Looking towards the lowest rankings of the index, it is unsurprising that even the upheaval caused by a global pandemic has had no discernible effect on the passport strength of the countries that take up the bottom spots. As it has for much of the index's history, Afghanistan is placed last, with a ranking of 110 and a visa-free/visa-on-arrival score of just 26. Iraq and Syria hold the 109th and 108th spots, respectively. Given these countries' lack of access to public health resources and the unlikelihood of their ability to distribute a vaccine widely, it would appear that their citizens will be faced with a growing number of obstacles when it comes to travel and mobility in the year to come.

As always, the results from the Henley Passport Index provide us with an illuminating snapshot of the world and how — depending on which travel documents we hold — we are able to move around it or are confined to immobility, starkly highlighting the growing gap in travel freedom, and forcing us to consider how an increasingly unpredictable array of forces will widen that gap in future.

About the Henley Passport Index

The Henley Passport Index is the original and most authoritative ranking of all the world's passports according to the number of destinations their holders can access without a prior visa. The index includes 199 passports and 227 travel destinations, giving users the most extensive and reliable information about their global access and mobility.

With historical data spanning 16 years and regularly-updated expert analysis on the latest shifts in passport power, the index is an invaluable resource for global citizens and the standard reference tool for government policy in this field.

Robust, reliable, and accurate

The ranking is based on exclusive data from the International Air Transport Association (IATA), which maintains the world's largest and most accurate database of travel information, and is enhanced by the *Henley & Partners* Research Department.

The index's scoring system was developed to give users a nuanced, practical, and reliable overview of their passport's power. Each passport is scored on the total number of destinations that the holder can access visa-free. For each travel destination, if no visa is required, then a score of 1 is allocated for that passport. This also applies if passport holders can obtain a visa on arrival, a visitor's permit, or an electronic travel authority (ETA) upon entry.

Where a visa is required, or where a passport holder must apply for a government-approved electronic visa (e-Visa) before departure, a score of 0 is assigned. The same applies if they need pre-departure approval for a visa on arrival.

IATA
International Air Transport Association

THE 2021 HENLEY PASSPORT INDEX

Rank	Passport	Visa-free score
1	Japan	191
2	Singapore	190
3	Germany	189
	South Korea	
4	Finland	188
	Italy	
	Luxembourg	
	Spain	
5	Austria	187
	Denmark	
6	France	186
	Ireland	
	Netherlands	
	Portugal	
	Sweden	
7	Belgium	185
	New Zealand	
	Norway	
	Switzerland	
	United Kingdom	
	United States	
8	Australia	184
	Czech Republic	
	Greece	
	Malta	
9	Canada	183
10	Hungary	182
11	Iceland	181
	Lithuania	
	Poland	
	Slovakia	
12	Latvia	180
	Slovenia	
13	Estonia	179
14	Liechtenstein	178
	Malaysia	
15	Chile	174
	Cyprus	
	Monaco	
16	United Arab Emirates	173
17	Romania	172
18	Bulgaria	171
	Croatia	
19	Argentina	170
	Brazil	
	Hong Kong (SAR China)	
20	San Marino	168
21	Andorra	167
22	Brunei	166
23	Barbados	161
	Israel	
24	Mexico	159
25	St. Kitts and Nevis	156
26	Bahamas	155
27	Uruguay	153
	Vatican City	
28	Antigua and Barbuda	151
	Seychelles	
29	Costa Rica	150
	Trinidad and Tobago	
30	St. Vincent and the Grenadines	148
31	Mauritius	146
	St. Lucia	
32	Taiwan (Chinese Taipei)	145
33	Grenada	144
	Macao (SAR China)	
34	Dominica	143
35	Panama	142
36	Paraguay	141
37	Peru	135
38	El Salvador	134
	Honduras	
	Serbia	
39	Guatemala	133
40	Samoa	131
	Solomon Islands	
41	Ukraine	130
	Vanuatu	
42	Colombia	129
	Nicaragua	
	Venezuela	
43	Tuvalu	127
44	Tonga	125
45	Montenegro	124
	North Macedonia	
46	Kiribati	123
	Marshall Islands	
47	Moldova	120
	Palau Islands	
48	Micronesia	118
49	Bosnia and Herzegovina	117
50	Russian Federation	116
51	Georgia	115
52	Albania	114
53	Turkey	110
54	Belize	101
	South Africa	
55	Kuwait	96
56	Qatar	95
57	Timor-Leste	94
58	Ecuador	92
59	Nauru	89
60	Fiji	88
	Guyana	
61	Jamaica	86
62	Botswana	85
	Maldives	
63	Papua New Guinea	84
64	Bahrain	83
65	Oman	80
66	Saudi Arabia	79
	Thailand	
67	Bolivia	78
	Suriname	
68	Namibia	77
69	Lesotho	76
70	Belarus	75
	China	
	Kazakhstan	
71	eSwatini	74
72	Malawi	73
73	Kenya	72
74	Indonesia	71
	Tanzania	
	Tunisia	
	Zambia	
75	The Gambia	68
76	Azerbaijan	67
	Uganda	
77	Cape Verde Islands	66
	Dominican Republic	
	Philippines	
78	Ghana	65
	Zimbabwe	
79	Cuba	64
	Morocco	
80	Armenia	63
	Kyrgyzstan	
	Sierra Leone	
81	Benin	62
	Mongolia	
	Mozambique	
82	Sao Tome and Principe	61
83	Rwanda	60
84	Burkina Faso	59
	Mauritania	
85	India	58
	Tajikistan	
86	Cote d'Ivoire	57
	Gabon	
	Uzbekistan	
87	Senegal	56
88	Equatorial Guinea	55
	Guinea	
	Madagascar	
	Togo	
89	Cambodia	54
	Mali	
	Niger	
	Vietnam	
90	Bhutan	53
	Chad	
	Comoro Islands	
	Guinea-Bissau	
	Turkmenistan	
91	Central African Republic	52
92	Algeria	51
	Jordan	
93	Angola	50
	Burundi	
	Egypt	
	Laos	
94	Cameroon	49
	Haiti	
	Liberia	
95	Congo (Rep.)	48
96	Djibouti	47
	Myanmar	
97	Nigeria	46
98	Ethiopia	44
99	South Sudan	43
100	Congo (Dem. Rep.)	42
	Eritrea	
	Sri Lanka	
101	Bangladesh	41
	Iran	
102	Kosovo	40
	Lebanon	
	Sudan	
103	North Korea	39
104	Libya	38
	Nepal	
105	Palestinian Territory	37
106	Somalia	33
	Yemen	
107	Pakistan	32
108	Syria	29
109	Iraq	28
110	Afghanistan	26

Powered by International Air Transport Association

This graph shows the full Global Ranking of the 2021 Henley Passport Index. In certain cases, a rank is shared by multiple countries because these countries all have the same level of visa-free or visa-on-arrival access.

Disclaimer: The information provided here reflects the 2021 Henley Passport Index ranking on 5 January 2021, and in certain instances, coronavirus-related travel bans may take precedence over the visa information recorded here.

STRONGEST AND WEAKEST PASSPORTS IN Q1 2021

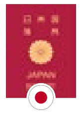
Japan steadfastly remains in the top spot on the Henley Passport Index in 2021, with a visa-free/visa-on-arrival score of 191 — a position it has remarkably held since 2018. Singapore is in 2nd place with 190, and Germany and South Korea hold joint-3rd place, with their citizens able to access 189 destinations.

At the other end of the global mobility spectrum, the Afghan passport remains the world's weakest, in 110th place, with a visa-free or visa-on-arrival score of just 26. Iraq and Syria fare not much better with scores of 28 and 29, respectively, while Pakistan scores 32 and Somalia and Yemen score 33.

Strongest Passports in Q1 2021

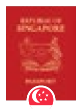
1st

Visa-free access to 191 destinations


Japan

2nd

Visa-free access to 190 destinations


Singapore

3rd

Visa-free access to 189 destinations


Germany

+


South Korea

4th

Visa-free access to 188 destinations


Finland

+


Italy

+


Luxembourg

+


Spain

5th

Visa-free access to 187 destinations


Austria

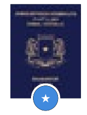
+


Denmark

Weakest Passports in Q1 2021

106th

Visa-free access to 33 destinations


Somalia

+


Yemen

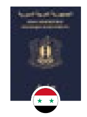
107th

Visa-free access to 32 destinations


Pakistan

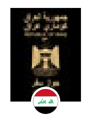
108th

Visa-free access to 29 destinations


Syria

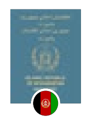
109th

Visa-free access to 28 destinations


Iraq

110th

Visa-free access to 26 destinations

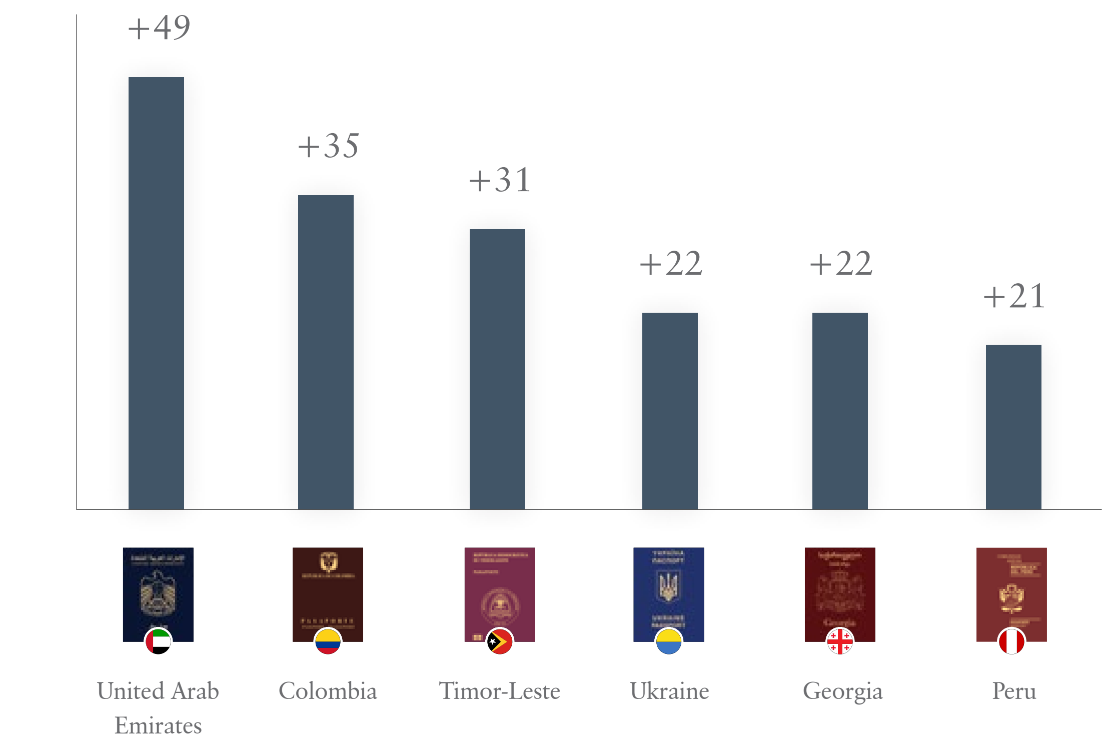

Afghanistan

This infographic shows the countries that occupy the highest and lowest ranks on the Henley Passport Index. In certain cases, a rank is shared by multiple countries if these countries all have the same level of visa-free or visa-on-arrival access.

Disclaimer: The information provided here reflects the 2021 Henley Passport Index ranking on 5 January 2021, and in certain instances, coronavirus-related travel bans may take precedence over the visa information recorded here.

BIGGEST CLIMBERS AND FALLERS ON THE HENLEY PASSPORT INDEX: 2011–2021

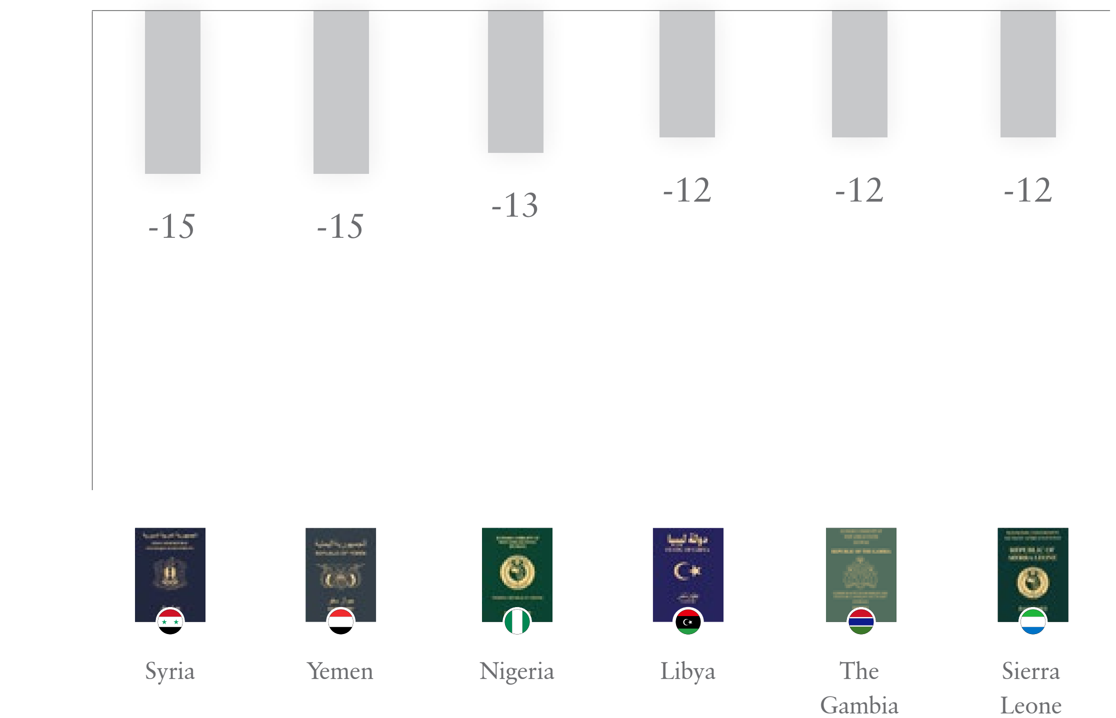
The two graphs show the countries that have climbed the highest up the Henley Passport Index rankings over the past decade and those that have fallen most sharply over that period.



	United Arab Emirates	Colombia	Timor-Leste	Ukraine	Georgia	Peru
2021	**16**	**42**	**57**	**41**	**51**	**37**
2011	65	77	88	63	73	58

Rank

Biggest Climbers since 2011



	Syria	Yemen	Nigeria	Libya	The Gambia	Sierra Leone
2011	93	91	84	92	63	68
2021	**108**	**106**	**97**	**104**	**75**	**80**

Rank

Biggest Fallers since 2011

Disclaimer: The information provided here reflects the 2021 Henley Passport Index ranking on 5 January 2021, and in certain instances, coronavirus-related travel bans may take precedence over the visa information recorded here.

Covid-19 and the Recovery of Mobility – Economics, Migration, and Governance

by ALEXEI CRESNIOV
Alex Cresniov serves as Director of Deep Knowledge Analytics and is the author of numerous DeepTech and GovTech reports.

As 2021 commences, global tourism remains at a virtual standstill owing to the pandemic, with any hope for a recovery dashed by the new Covid-19 variants that emerged in late December. When it comes to travel freedom, the pandemic has somewhat leveled the playing field, albeit temporarily. For developed and developing nations alike, limited human mobility around the world is currently not only the result of a lack of social freedom or poor economic development but also a failure of risk management, health readiness, and monitoring and detection.

In numerous countries there are telling trend lines showing links between their visa-free scores on the Henley Passport Index and not just their economic and social freedom but also — as our research reveals — their healthcare and emergency preparedness, Covid-19 monitoring and detection, and government efficiency. There are certain countries with stronger economies and well-developed public health systems that have had their vulnerabilities exposed by the pandemic, often because they did not actively introduce certain timely measures.

> *…certain countries with stronger economies and well-developed public health systems have had their vulnerabilities exposed by the pandemic…*

In the face of the coronavirus pandemic, Deep Knowledge Group's Covid-19 Risk and Safety Assessment (Covid-19 Safety Assessment) study was designed to classify, analyze, and rank the economic, social, and health stability achieved by the 250 countries and regions included in its analysis, as well as the strengths, weaknesses, opportunities, and threats or risks that they present in the battle against the global health and economic crisis triggered by Covid-19.

The methodology of the Covid-19 Safety Assessment is based on calculations involving six overarching categories, namely, quarantine efficiency, government efficiency of risk management, monitoring and detection, health readiness, regional resilience, and emergency preparedness, with over 140 sub-parameters and more than 35,000 data points. The Henley Passport Index is an authoritative ranking of the passport strength of 227 destinations — travel freedom has proven links with both economic and social freedom. In the current context, the general perception of these concepts, and of world mobility in general, is changing considerably. As such, it is helpful to find commonalities between them and to reveal irregularities within any country's national healthcare policies and other related systems, thereby transitioning from an approach to health-related governance that is based on deep knowledge rather than common belief.

Furthermore, raising awareness of the issue of the economic fragility of certain countries will contribute, if not to the resolution of the challenges it presents, then at least to identifying means of mitigating risk in the foreseeable future.

The decimation of tourism

Major tourism indicators declined by between 50% and 90% year-on-year in 2020 compared to 2019 — a gap that is projected to continue widening for the foreseeable future. Air reservations dropped by 90% in 2020, the number of inbound tourists fell by 70%, and hotel bookings decreased by 50%. October 2020 data revealed that hotel occupancy rates also reduced dramatically, ranging from a decline of 19% in Central America to 62% in Northeast Asia and as high as 44% globally. This has been particularly damaging to economies that rely on the hospitality sector especially, including small island states in which exports comprise up to 95% of the sector. Necessary food imports in such destinations greatly depend on foreign currency exchange rates, amid lack of diversification, and the national currency maintained by cash inflows from tourists. Many countries with the lowest levels of healthcare readiness and emergency preparedness in the Covid-19 Safety Assessment had failed to diversify their GDP and exports prior to the pandemic, leaving them even more vulnerable when their governments had to make difficult choices due to mounting pressure from the subsequent economic crisis. Thankfully, the health of the population appears to have been prioritized by most countries regardless of the quality of their healthcare systems, and even countries with less developed healthcare sectors were among those that decided against lifting travel restrictions early. While tourism is the most obvious, there are other drivers of mobility that have been affected by the pandemic, including labor migration and forced migration.

The increasing vulnerability of internally displaced people

While a shortfall of demand in global markets is forcing migrants to return to their countries of birth, which in turn creates an additional economic burden in those already fragile places, internally displaced people, asylum seekers, and refugees were already among the world's most vulnerable populations. Now, even more restricted access to healthcare services and medicine indicates that extreme vulnerability lies ahead for displaced people.

Those forced to move due to poverty, wars and conflict, climate change, and other natural disasters rely completely on financial aid and in-kind assistance. Thanks to financial technologies in the charity and impact investing sectors, citizens in almost every state are able to connect themselves to those in need easily by making donations, investing, or granting credit through trusted platforms and organizations.

The link between governance and global mobility

As the graphs on pages 40 to 42 illustrate, overlaying the Covid-19 Safety Assessment and Henley Passport Index data to compare countries' visa-free scores (the dark blue lines) and the various parameters of the Covid-19 Safety Assessment (the light gray lines) shows definite correlations between the trend lines for travel freedom and those for government efficiency of risk management, health readiness, and monitoring and detection. By contrast, there is far less correlation between travel freedom and emergency preparedness, country vulnerability, and quarantine efficiency indicators. As the graphs reveal, the latter two indicators (which include the key indicators of number of cases and mortality rate) show the least correlation with travel freedom (which is associated, *inter alia*, with economic and social freedom). This presents a challenge for developed countries and it also suggests the need to review performance criteria in more detail.

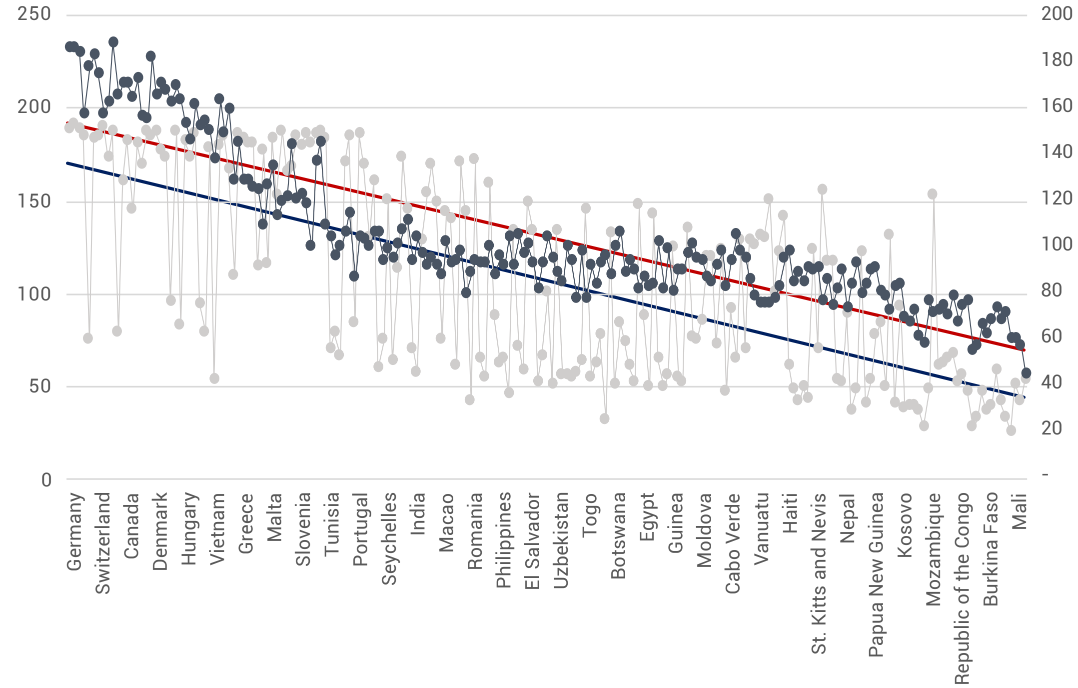
> *…global immobility is not solely the plight of citizens of less advanced countries.*

Citizens of more developed countries that generally occupy the upper positions of the Henley Passport Index, formally having more freedoms, remain at the time of writing *de facto* less mobile than they were pre-pandemic and limited in their freedom to travel owing to restrictions in four of the ten largest sources of outbound tourism (countries that are leaders in terms of the number of citizens traveling to other countries). At the same time, citizens of developing and less developed countries, in addition to having visa-free access to a far smaller number of travel destinations, are also affected by restrictive measures and have even fewer options in terms of purchasing power.

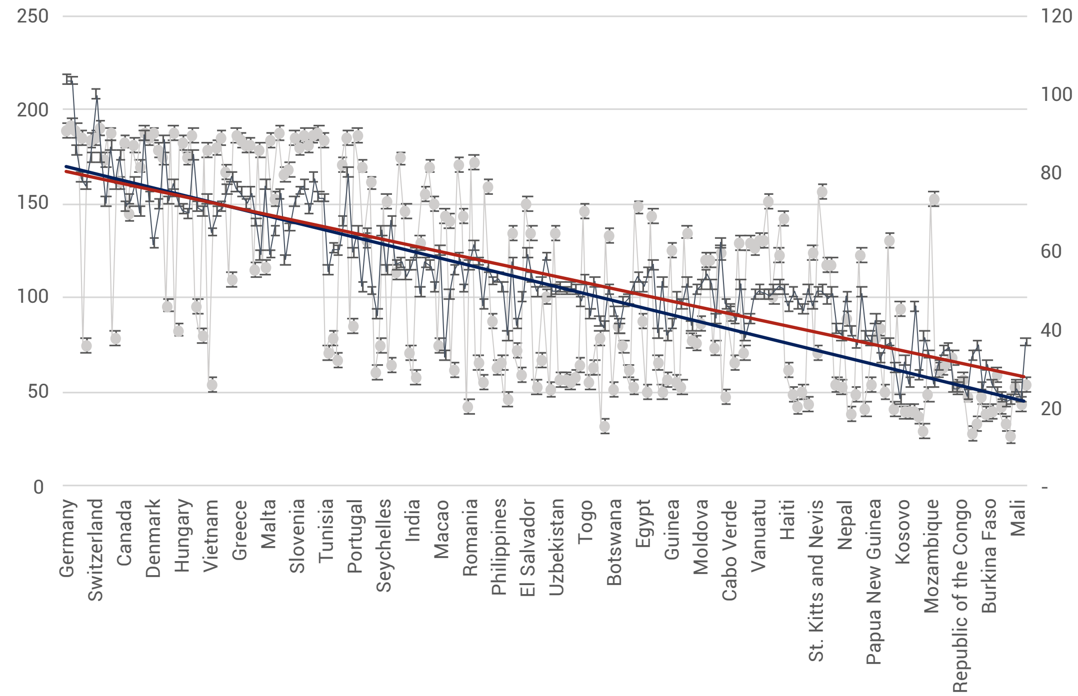
A conclusion can therefore be made that limited human mobility around the world is not only the result of a lack of social freedom or poor economic development but also a failure of risk management, health readiness, and monitoring and detection. In other words, global immobility is not solely the plight of citizens of less advanced countries.

Comparisons of Covid-19 Safety Assessment Data and Henley Passport Index Data

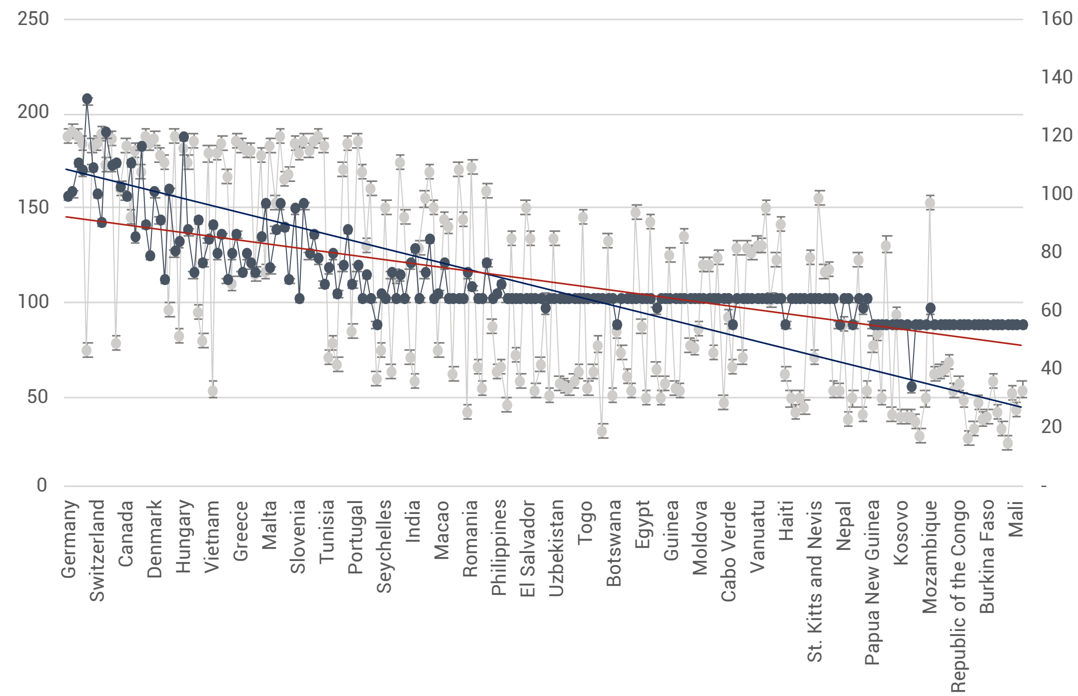
Visa-Free Score (dark blue) and Government Efficiency (light gray)



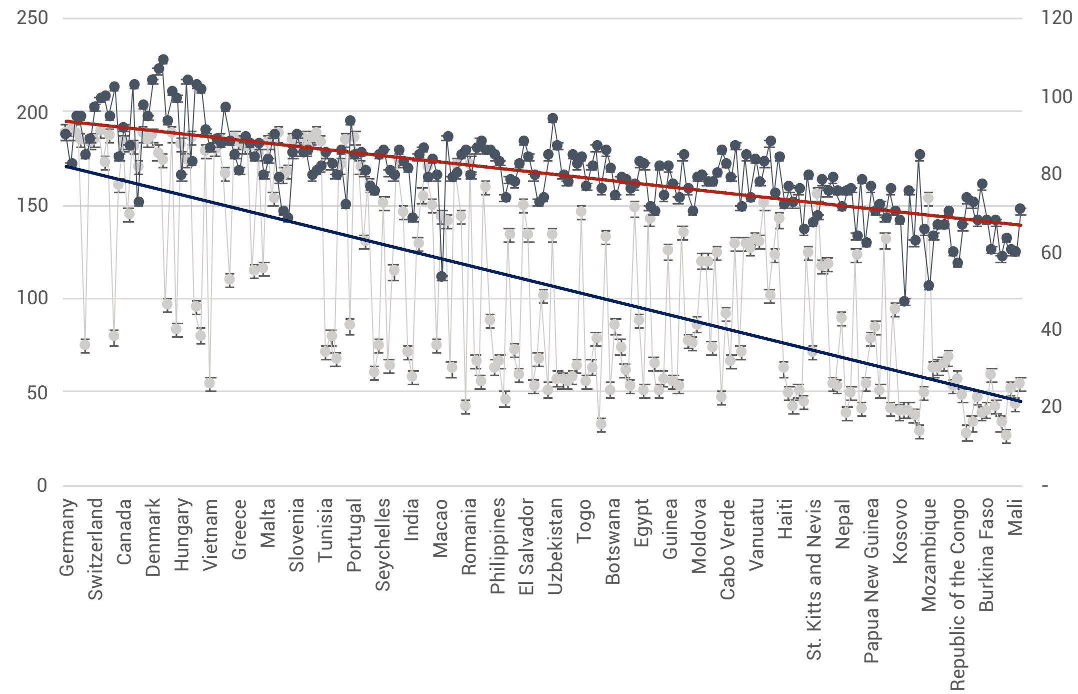
Visa-Free Score (dark blue) and Health Readiness (light gray)



Visa-Free Score (dark blue) and Emergency Preparedness (light gray)

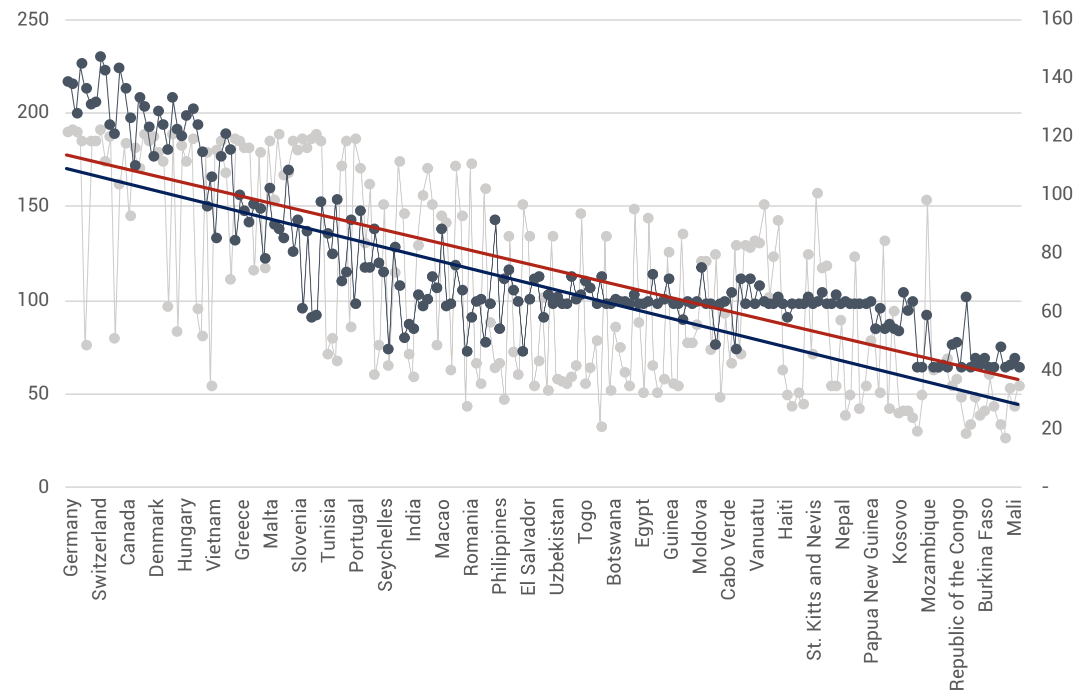


Visa-Free Score (dark blue) and Country Vulnerability (light gray)

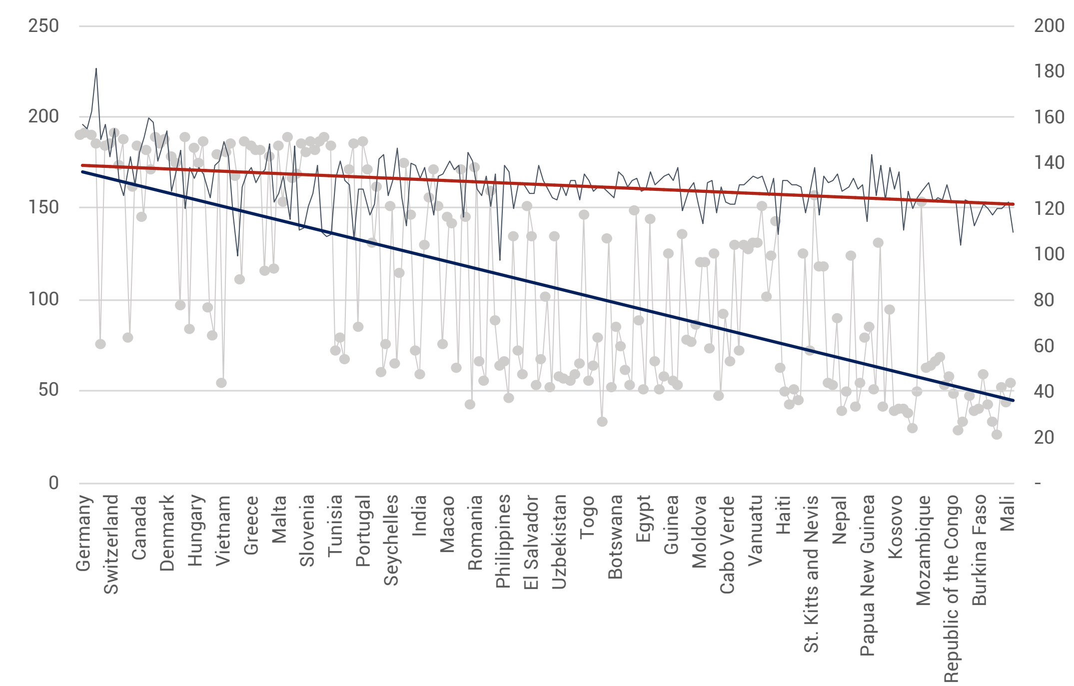


Comparisons of Covid-19 Safety Assessment Data and Henley Passport Index Data

Visa-Free Score (dark blue) and Monitoring and Detection (light gray)



Visa-Free Score (dark blue) and Quarantine Efficiency (light gray)



Urban migration and new portraits of mega-cities

Historically there has been a strong incidence of return migration to rural areas from cities when economic activity has decreased. This could well be the case in the context of the current pandemic, when a near-total cessation of urban economic activity combined with a need for social distancing, exercise, and open spaces drives people from cities to more rural areas. Mega-cities that are currently overcrowded owing to past influxes of people seeking employment and wanting to be close to business centers could become less populated Dealing with the extreme complexities inherent to both viruses and economic systems, municipal governments are forced to focus more on accountability, planning, and measurement. On the other hand, the coronavirus shock could prove to have been the starting pistol of a marathon towards greater sustainability and changing patterns of behavior in favor of reduced burdens on facilities and transport. Covid-19 is a truly unprecedented global challenge of the 21st century that has affected almost all the Earth's population.

What will become the new normal — a shift from egalitarianism to an even greater commodification of space, or a careful transition to an integrated approach and a thoughtful attitude towards safety, sustainability, and intra-regional cooperation? Or will there be more tight vertical interactions between the state authorities and each region? It will depend significantly on the existing institutional environment, including flexibility regarding cultural values and social norms. The prolific success of countries such as Australia, Japan, New Zealand, Singapore, South Korea, and Switzerland that have both high visa-free scores (which is usually indicative of high levels of social and economic freedom) and high Covid-19 Safety Assessment scores (which include indicators embracing government and healthcare efficiency and preparedness), proves that human-oriented and well-balanced technological progress as opposed to pure economic growth are more crucial ingredients of change, while recent challenges only highlight their urgency.

"

Covid-19 is a truly unprecedented global challenge of the 21st century that has affected almost all the Earth's population.

A balanced, coherent crisis response is required

The above research has made it apparent that to focus on growth alone might exacerbate the fragility of society. Both the economic system and the pandemic — being phenomena of the highest complexity — are so unpredictable that it would be unwise to respond to single macro-economic factors. Developed and developing countries alike will need to account for the extreme complexities inherent in both the phenomenon of the virus and the economy and harmonize their approach towards sustainability in all respects. A coherent approach to intra- and inter-governmental cooperation and human-oriented technological progress could be the key to taming both challenges, thereby restoring mobility to all.

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Antigua and Barbuda
+1 514 288 1997
antigua@henleyglobal.com

Australia
+61 3 8680 2525
australia@henleyglobal.com

Austria
+43 1 361 6110
austria@henleyglobal.com

Canada
+1 514 288 1997
canada@henleyglobal.com

China
+86 21 6137 3213
shanghai@henleyglobal.com

Cyprus
+357 2531 1844
cyprus@henleyglobal.com

Dubai (UAE)
+971 4 392 77 22
dubai@henleyglobal.com

Greece
+357 2531 1844
greece@henleyglobal.com

Grenada
+1 514 288 1997
grenada@henleyglobal.com

Hong Kong
+852 3101 4100
hongkong@henleyglobal.com

India
+9122 6110 0780
india@henleyglobal.com

Jersey (British Isles)
+44 1534 514 888
jersey@henleyglobal.com

Latvia
+371 66 05 10 09
latvia@henleyglobal.com

Malaysia
+603 2731 9340
malaysia@henleyglobal.com

Malta
+356 2138 7400
malta@henleyglobal.com

Moldova
+373 22 109 209
moldova@henleyglobal.com

Montenegro
+382 20 674 074
montenegro@henleyglobal.com

Nigeria
234 14 489 277
nigeria@henleyglobal.com

Philippines
+63 2 8669 2771
philippines@henleyglobal.com

Portugal
+351 213 970 977
portugal@henleyglobal.com

Singapore
+65 6438 7117
singapore@henleyglobal.com

Slovakia
+421 2 3231 0677
slovakia@henleyglobal.com

South Africa
+27 21 850 0524
southafrica@henleyglobal.com

South Korea
+82 2 2008 4664
korea@henleyglobal.com

St. Kitts and Nevis
+1 514 288 1997
stkitts@henleyglobal.com

St. Lucia
+1 514 288 1997
stlucia@henleyglobal.com

Switzerland
+41 44 266 22 22
switzerland@henleyglobal.com

Thailand
+662 041 4628
thailand@henleyglobal.com

United Kingdom
+44 207 823 10 10
uk@henleyglobal.com

Vietnam
+84 28 3827 1797
vietnam@henleyglobal.com

henleyglobal.com

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