Henley & Partners

The Henley Passport Index

Q4 2020 Report

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 15 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.

Explore the world

As well as allowing users to discover the strength of their own passports, henleypassportindex.com enables them to compare their passport to others by looking at differences in access and learning where their passport ranks regionally as well as globally. The site also allows users to explore 15 years' worth of historical data and discover how the strength of their passport has changed over the years and view the top climbers and fallers on the index.

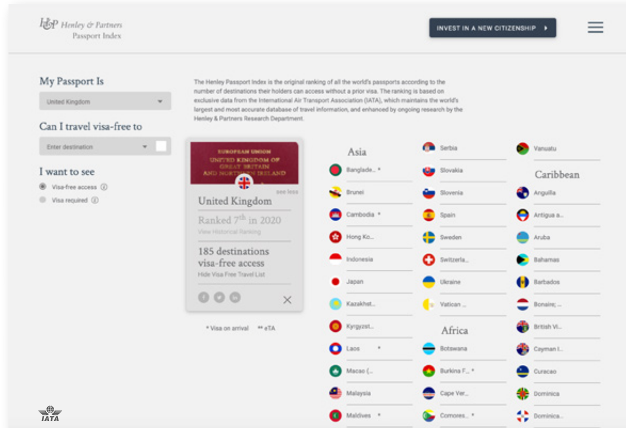
Travel Freedom — A Necessary Luxury

Dr. Christian H. Kaelin

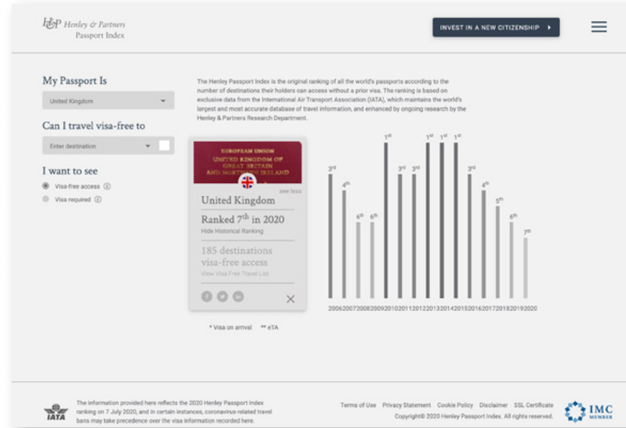
Chairman of *Henley & Partners* and the inventor of the passport index concept

"For citizens of wealthy and democratic countries such as Canada, the UK, the US, and Western European nations, travel freedom is something that has been taken for granted for decades. The pandemic has abruptly changed this, and with the significant loss of access and privilege has come a re-evaluation. As countries around the world battle to manage a new category of risk, there's been a shift away from travel freedom being regarded as the prerogative of nationals with once-powerful passports, towards a realization that it is now a necessary luxury for those wishing to access first-class education, business opportunities, and quality healthcare for themselves and their families."

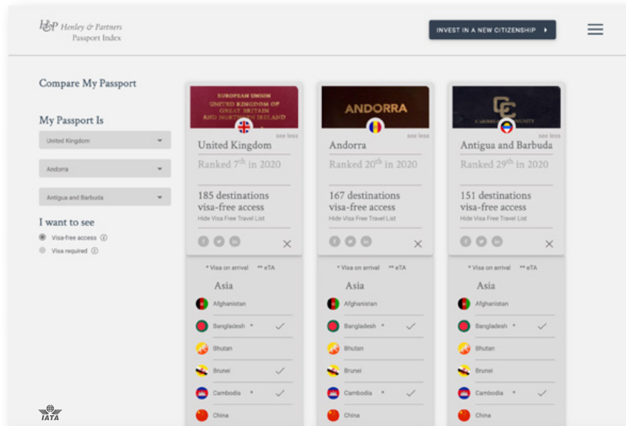
Visit henleypassportindex.com



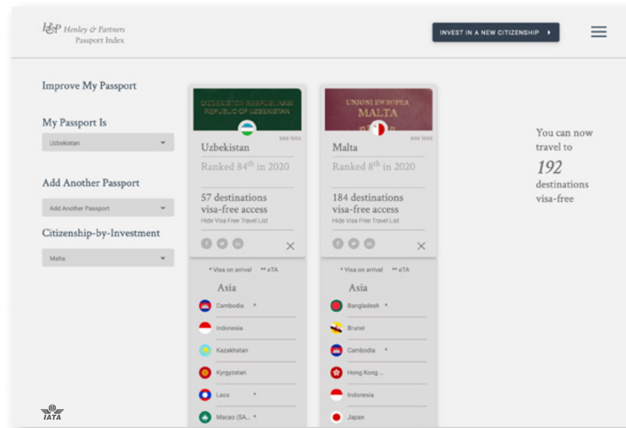
Find out where you can travel visa-free



View your passport's ranking over 15 years



Compare your passport power



Improve your passport power

Powered by
International Air Transport Association

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	Lithuania	181
	Poland	
	Slovakia	
12	Iceland	180
	Latvia	
	Slovenia	
13	Estonia	179
14	Liechtenstein	178
	Malaysia	
15	Chile	174
	Cyprus	
	Monaco	
16	Romania	172
17	Bulgaria	171
	Croatia	
18	Argentina	170
	Brazil	
	Hong Kong (SAR China)	
	United Arab Emirates	
19	San Marino	168
20	Andorra	167
21	Brunei	166
22	Barbados	161
23	Israel	160
24	Mexico	159
25	St. Kitts and Nevis	156
26	Bahamas	155
27	Vatican City	154
28	Uruguay	153
29	Antigua and Barbuda	151
	Seychelles	
30	Costa Rica	150
	Trinidad and Tobago	
31	Mauritius	148
	St. Vincent and the Grenadines	
32	St. Lucia	146
	Taiwan (Chinese Taipei)	
33	Grenada	144
	Macao (SAR China)	
34	Panama	142
35	Dominica	141
	Paraguay	
36	Peru	135
37	El Salvador	134
	Honduras	
	Serbia	
38	Guatemala	133
39	Samoa	131
	Solomon Islands	
40	Vanuatu	130
41	Nicaragua	129
	Ukraine	
	Venezuela	
42	Colombia	127
	Tuvalu	
43	Tonga	125
44	Montenegro	124
	North Macedonia	
45	Kiribati	123
	Marshall Islands	
46	Moldova	120
	Palau Islands	
47	Micronesia	118
48	Bosnia and Herzegovina	117
	Russian Federation	
49	Georgia	115
50	Albania	114
51	Turkey	111
52	Belize	101
	South Africa	
53	Kuwait	96
54	Qatar	95
	Timor-Leste	
55	Ecuador	91
56	Nauru	89
57	Fiji	88
	Guyana	
58	Jamaica	86
59	Botswana	85
	Maldives	
60	Papua New Guinea	84
61	Bahrain	83
62	Oman	80
63	Thailand	79
64	Bolivia	78
	Saudi Arabia	
	Suriname	
65	Namibia	77
66	Lesotho	76
67	Belarus	75
	China	
	Kazakhstan	
68	eSwatini	74
69	Malawi	73
70	Kenya	72
71	Indonesia	71
	Tanzania	
	Tunisia	
	Zambia	
72	The Gambia	68
73	Azerbaijan	67
	Uganda	
74	Cape Verde Islands	66
	Dominican Republic	
	Philippines	
75	Ghana	65
	Zimbabwe	
76	Cuba	64
	Morocco	
77	Armenia	63
	Kyrgyzstan	
	Sierra Leone	
78	Benin	62
	Mongolia	
	Mozambique	
79	Sao Tome and Principe	61
80	Rwanda	60
81	Burkina Faso	59
	Mauritania	
82	India	58
	Tajikistan	
83	Cote d'Ivoire	57
	Gabon	
	Uzbekistan	
84	Senegal	56
85	Equatorial Guinea	55
	Guinea	
	Madagascar	
	Togo	
86	Cambodia	54
	Mali	
	Niger	
	Vietnam	
87	Bhutan	53
	Chad	
	Comoro Islands	
	Guinea-Bissau	
	Turkmenistan	
88	Central African Republic	52
89	Algeria	51
	Jordan	
90	Angola	50
	Burundi	
	Egypt	
	Laos	
91	Cameroon	49
	Haiti	
	Liberia	
92	Congo (Rep.)	48
93	Djibouti	47
	Myanmar	
94	Nigeria	46
95	Ethiopia	44
96	South Sudan	43
97	Congo (Dem. Rep.)	42
	Eritrea	
	Sri Lanka	
98	Bangladesh	41
	Iran	
99	Kosovo	40
	Lebanon	
	Sudan	
100	North Korea	39
101	Libya	38
	Nepal	
	Palestinian Territory	
102	Somalia	33
	Yemen	
103	Pakistan	32
104	Syria	29
105	Iraq	28
106	Afghanistan	26

Disclaimer: The information provided here reflects the 2020 Henley Passport Index ranking on 13 October 2020, and in certain instances, coronavirus-related travel bans may take precedence over the visa information recorded here.

Q4 Insights and Analysis: A New Global Mobility Hierarchy Emerges as International Travel Resumes

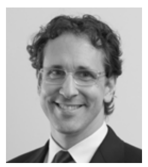
Coronavirus-related travel restrictions are beginning to lift in some countries after more than six months of panic and uncertainty. The resumption of international cross-border travel may appear to be a signal that things are slowly returning to normal, but as the latest research from the Henley Passport Index — based on exclusive data from the International Air Transport Association (IATA) — shows, the pandemic has completely upended the seemingly unshakeable hierarchy of global mobility that has dominated the last few decades, with more change still to come.

At the beginning of the year, for instance, the US passport was ranked in 6th position on the Henley Passport Index — the original ranking of all the world's passports according to the number of destinations their holders can access without a prior visa — and Americans could travel hassle-free to 185 destinations around the world. Since then, that number has dropped dramatically by over 100, with US passport holders currently able to access fewer than 75 destinations, with the most popular tourist and business centers notably excluded. As criticism of the country's pandemic response continues to mount, and with the US presidential election just weeks away, the precipitous decline of US passport power and American travel freedom is seen as a clear indication of its altered status in the eyes of the international community.

Other significant changes in the once-solid global mobility hierarchy paint an equally vivid picture of the chaos caused by the Covid-19 pandemic. At the beginning of 2020, the Singapore passport was ranked 2nd globally, with passport holders able to access an unprecedented 190 destinations globally. However, under the current travel restrictions, Singaporeans can travel to fewer than 80 destinations around the world.

Unsurprisingly, those countries whose coronavirus responses have been criticized for being inadequate have taken the greatest knock when it comes to the travel freedom of their citizens. Brazilian passport holders were able to access 170 destinations without acquiring a visa in advance in January. Currently, approximately only 70 destinations are accessible. The decline in mobility and passport power for countries such as India and Russia have been less dramatic, but nevertheless indicative of an overall shift. Russian citizens had access to 119 destinations prior to the Covid-19 outbreak but can currently travel to fewer than 50. At the beginning of the year, Indian passport holders could travel to 61 destinations without a visa but due to virus-related restrictions, they currently have access to fewer than 30.

Without taking the various pandemic-related travel bans and restrictions into account, Japan continues to hold the number one spot on the Henley Passport Index, with a visa-free/visa-on-arrival score of 191. Singapore remains in 2nd place, with a score of 190, while Germany and South Korea are tied 3rd, each with a score of 189. EU member states continue to perform best overall, with countries from the bloc taking up most of the spots in the index's top 10.



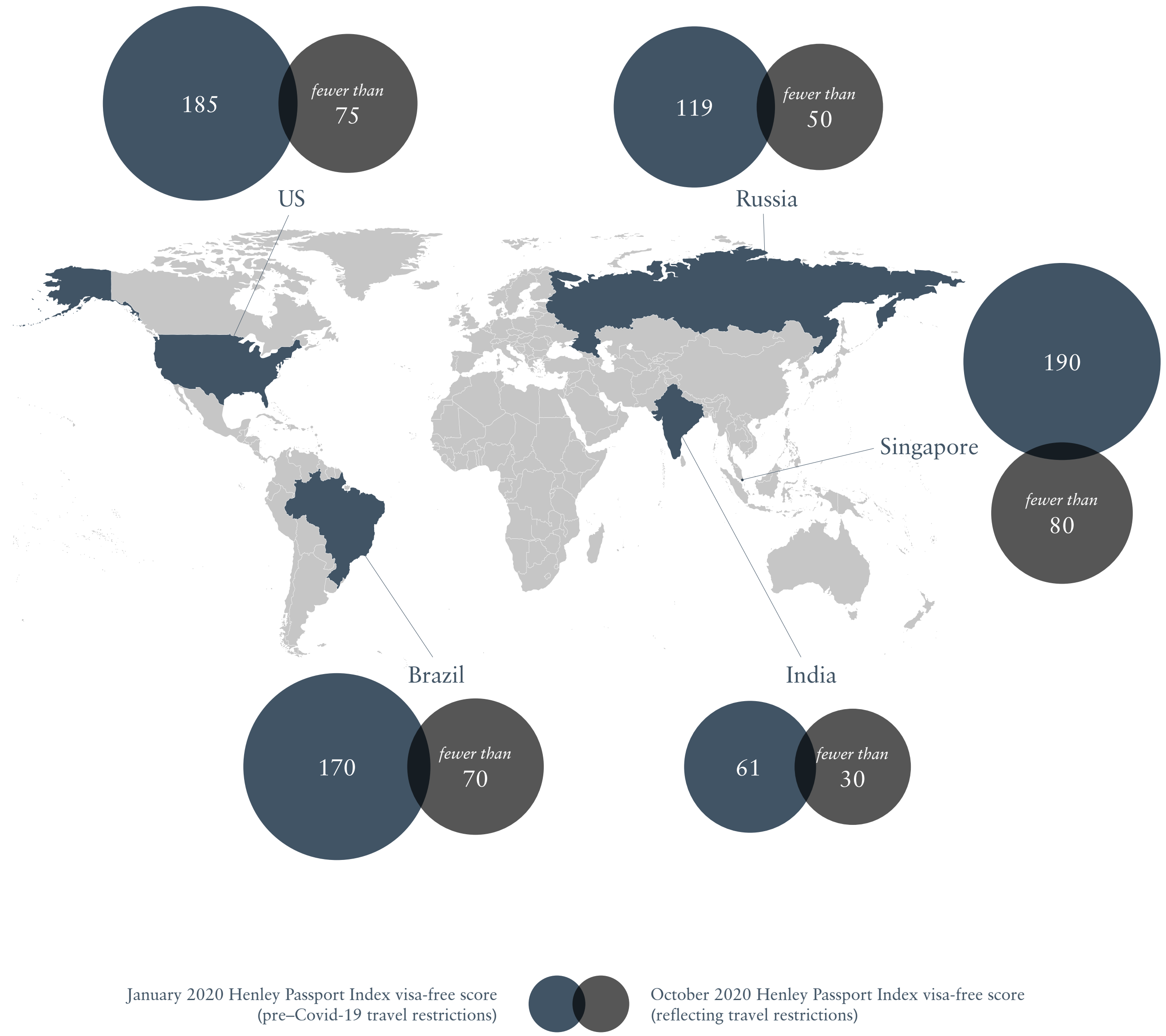
Alternative Residence or Citizenship — Indispensable Assets

Dr. Juerg Steffen

CEO of *Henley & Partners*

"The events of this year have demonstrated that we cannot predict the future, but for those high-net-worth investors who want to ensure they are well prepared for the next major disruption, alternative residence or citizenship is increasingly seen as an indispensable asset and a vital hedge against ongoing volatility."

Decline in Travel Freedom Comparison: January 2020 versus October 2020



Disclaimer: To the best of our knowledge, the information depicted above is accurate and reliable as of 25 September 2020; however, we do not assume any liability whatsoever for the accuracy and completeness of the above information due to the rapidly changing nature of Covid-19 travel restrictions.

Covid-19 and the Future of Global Mobility – Individual Merit Will Trump Nationality

Dr. Parag Khanna

Founder and managing partner of FutureMap, a data and scenario based strategic advisory firm based in Singapore, and author of numerous books including *Connectography* and *The Future is Asian*

In recent years we have grown accustomed to Asian passports climbing the ladder of global access — but not to Western passports tumbling down. The every-country-for-itself Covid-19 response has been particularly cruel to Americans, whose visa-free score has plummeted from 184 in January to fewer than 75 destinations when the current travel restrictions are considered. And while these include Canada and Mexico, America's only two borders remained firmly closed regardless. Furthermore, the EU has steadfastly kept the US off its safe list. It is highly unlikely that the outcome of the US election in either direction will suddenly lift suspicions; only a vaccine or wealth can restore mobility for America's international travelers.

The system will not return to what it was before: Nationality will not suffice to guarantee safe passage. Even for the holders of still-powerful passports such as Japan, New Zealand, South Korea, and EU member states, additional protocols will be required to regain relatively frictionless mobility. For example, to avoid onerous quarantines, individuals will have to certify their health immunity through vaccination certificates or digital immunity passports and other special registrations. There is a war for tourists and talent, but not at all costs.

The new global mobility hierarchy may be tied far more to individual merit than to nationality alone. There are two reasons for this. First, high unemployment has led to 'employment nationalism' by which governments are strongly pressuring firms to hire citizens over foreigners. At the same time, the growing trend towards rigorous highly skilled migrant programs has reached many countries, each requiring significant checks on an individual's financial, criminal, and professional history irrespective of nationality. To some this may seem to be an onerous new development, but it 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 and citizenship programs, whether to digital nomads, those looking to acquire second passports, or those wishing to change nationality altogether. Even prior to the pandemic, Brexit had pushed British professionals to seek German, French, Spanish, and other EU nationalities based on lineage, or to pursue residency leading to citizenship in countries such as Portugal. Americans have availed themselves of similar options in countries ranging from Canada to Malta. Recent estimates suggest that interest in investment migration programs has jumped five-fold from 2019 through mid-2020. The new mobility hierarchy will therefore certainly look completely different post Covid.

Our collective intuition suggests that those who remain mobile and who can afford to travel for leisure may take fewer holidays of longer duration, meaning that destinations that allow for remote work while also offering cultural stimulation or exhilarating natural surroundings will be well positioned. Media coverage has already sensationalized the open-ended residence offerings of island nations from Bermuda to Fiji. In the medium term, however, connected hubs offering hassle-free entrepreneur visas and permanent residence such as Singapore, or long-term residence such as Thailand and the UAE, are likely to see far more uptake. 'Every country for itself' is rapidly becoming 'every person for themself'.

A Green Recovery from Covid-19 Could Alter the Course of Global Migration

Charles Phillips

Independent researcher and consultant for Oxford Business Group whose field of expertise is energy and climate change policy in the Middle East

Since the outbreak of Covid-19, national lockdowns and limits on mobility have caused a reduction in global carbon emissions. Given the intimate connection between the adverse impacts of climate change and future patterns of global migration, it is important to ask whether Covid-19 and the economic fallout will have a significant long-term impact on climate change. Ultimately, the lower the emissions globally, the lower the threat of extreme weather events and changes in climate that will exacerbate pressures for people in vulnerable regions to migrate.

The short answer to this question is: no. Unless considered and targeted action is taken to keep emissions down, Covid-19's impact on climate change is likely to be negligible. Alarmingly, the economic fallout from the pandemic may even cause global emissions to increase. However, depending on action taken by governments, there may be hope for the climate. If a 'green recovery' is pursued, Covid-19 could act as an inflection point that puts us on a pathway to emissions reductions.

At the beginning of 2020, global emissions were on an upward trajectory and were projected to rise. However, in the first quarter of 2020 the dramatic slowdown in global economic activity caused a sharp fall in carbon emissions. Road transport globally had fallen by almost 50% as of March 2020, while global aviation had fallen by 60%. Industrial output was also down. As a result, there was a substantial decline in the global consumption of fossil fuel, with oil demand witnessing a record drop of over 20 million barrels per day in April 2020. Correspondingly, global CO_2 emissions fell by an estimated 17% in early April 2020 during peak lockdown.

Despite these dramatic figures, projections have suggested that overall global CO_2 emissions in 2020 will see a reduction of between only 4% and 7%, which is expected to impact the rate of increase in concentrations of CO_2 in the atmosphere only slightly. Given that our energy system is still largely reliant on coal, oil and gas to power our global economy, a swift return to pre–Covid-19 emissions levels can be expected as economies rebuild, including a return to the same upward trajectory of emissions growth.

The current economic crisis, however, has created an opportunity for change. Action taken to address the economic recovery could substantially influence the long-term rise or fall of global emissions. If certain environmental regulations are lifted in order to kick-start economic growth, such as industrial pollution controls or vehicle emissions standards, emissions will increase, but if substantial investment is channeled towards a green recovery with significant action to phase out fossil fuels, a pathway to sustained emissions reductions can be expected.

The EU has shown signs of action, with a proposal to improve its emissions reductions target from 40% to 55% by 2030 currently under discussion. The outcome of the upcoming US election will also be of paramount importance to the direction of global climate policy over the next four years. To ensure global emissions do not rise more than 2° C above pre-industrial levels (the target of the 2015 Paris Agreement), sustained emissions cuts of 3% per year would be needed between 2020 and 2030. Cuts of 7% per year would be needed to reach the 1.5° C target. If this is not achieved, there is little doubt that climate-induced migration will rise dramatically in the coming decades.

Last-Minute Brexit Turbulence Prolongs Uncertainty in the UK

Rob McNeil

Deputy Director and Head of Media and Communications at the Migration Observatory the University of Oxford in the UK

A year ago, it would have been inconceivable that Brexit would be relegated to being a secondary concern for most who follow UK migration issues. The tragic impacts of Covid-19 have exploded the concept of 'business as usual'. The pandemic has forced a fundamental re-evaluation of how businesses and industries function, how education is delivered, and even whether friends and relatives in other countries can be visited.

Nevertheless, the end of 2020 approaches, yet another dramatic Brexit 'finale' looms. The end of the transition period is in sight, yet there is a real risk that disagreements or political brinkmanship will see the UK leaving the EU with no deal.

Whatever the final form of the UK's departure from the EU, it is likely to affect migration. After the 2016 referendum, the depreciation of the pound reduced the UK's attractiveness to EU workers — something that may recur if Brexit rattles financial markets further. Meanwhile, increased restrictions on EU migrants' access to the UK labor market, including skills and income requirements, are set to be implemented as new rules under the 2020 immigration bill. It seems inevitable these will lead to a fall in EU migration to the UK.

The potentially bumpy ride ahead for 2021 follows a migration rollercoaster in 2020. By the first quarter of 2020, the Office for National Statistics reported that annual net migration to the UK had reached 313,000 — levels not seen since before the referendum. But as Covid hit and a national lockdown was enforced, migration ground to a halt.

Home Office data reveals that in the second quarter of 2020, the UK saw falls of 96% in skilled work visas, 90% in family visas, and 99% in study visas issued compared to the same quarter in 2019.

How long these effects will last remains unclear, and it is worth considering what lies behind these dramatic statistics. For example, the closure of many of visa application centers during the crisis will have reduced the number of visas issued. And while people may have been hesitant to submit applications during the uncertainty of lockdown, humanity's extraordinary ability to adjust has seen the quick emergence of a 'new normal', in which society has tentatively begun to function again. There may well be a rise in the number of visas issued, even if moderate, as visa centers reopen and clear backlogs, and people dust-off the applications they had put on hold.

But more enduring economic effects can be expected. Covid-19 has caused some businesses to collapse, others to furlough or lay-off much of their workforces, and an overall reduction in confidence in the state of the nation's businesses and labor markets. A weaker economy could tarnish the attractiveness of the UK to would-be migrant workers and reduce demand for migrant labor, with fewer jobs available, and political efforts being concentrated on employing resident workers.

The future for international students is particularly uncertain. UK universities are highly reliant on overseas students, and the extent to which their numbers will fall as a result of Covid-19 will only be clarified at the end of 2020 when the third quarter's statistics are published, as this is when most students receive their visas. But analyses from economists do not bode well, with bodies such as the Institute for Fiscal Studies suggesting that universities can expect lower international student numbers, potentially causing serious financial difficulties for tertiary education institutions.

So, buckle-up. The rollercoaster ride is not over yet.

Covid-19 Jeopardizes Mobility in Europe's Schengen Area

Prof. Simone Bertoli

Professor of Economics at Université Clermont Auvergne in France and a Research Fellow at the Institute of Labor Economics in Germany

In March 2020, most European countries unilaterally closed their borders without notifying the European Commission, thereby also denying entry to their non-resident citizens — violating the Universal Declaration of Human Rights, which states (Article 13) that "everyone has the right […] to return to his country".

Will the resurgence of Covid-19 in Europe produce serious consequences for free mobility within the Schengen Area again? It is difficult to be optimistic as the single most important factor that could trigger new cross-border restrictions is the evidently markedly different trajectories of the pandemic across European countries. Nevertheless, what happened in March is unlikely to be repeated. The announcement of an unprecedented EU recovery plan, partly financed through collective debt, reduces the risk of uncoordinated unilateral decisions to close borders, as countries will seek to avoid diplomatic friction. France's pivotal role in the difficult recovery plan negotiations probably partially explains why Italy, the main beneficiary, has not restricted mobility from its western neighbor, notwithstanding the soaring number of cases in France since mid-August.

By late September, Hungary alone had resorted to a formal (*de jure*) closure of its national borders (except for the citizens of a few neighboring countries). However, a growing number of countries have taken or are considering introducing measures that imply *de facto* border closures, such as keeping borders open but testing travelers on arrival. This is feasible only if the number of cross-border travelers plummets, as countries will otherwise struggle even more than they are currently to conduct tests and deliver rapid results or implement mandatory quarantining. So, dark times ahead for mobility within Europe's Schengen Area.

Middle Eastern Conflict and Crises Drive Emigration and Displacement

Lorraine Charles

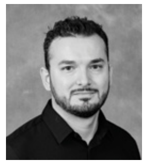
Research Associate at the Centre for Business Research at the University of Cambridge in the UK

Middle Eastern migration is heavily influenced by political dynamics, but more often by conflict. The region has become synonymous with waves of refugees — Palestinians fleeing Israeli occupation in 1948; Iraqis escaping various conflicts, and more recently, Syrians escaping civil war.

Like other Middle Eastern countries that have experienced protracted conflict, Lebanon's is a different migration narrative. Lebanon is a country of emigration; its diaspora is larger than the number of Lebanese in Lebanon. Despite several waves of Lebanese pursuing immigration pathways to Europe and North and South America, Lebanese emigrants have not been burdened with the label of 'refugees', likely because most who fled were at least middle class and benefited from extensive networks abroad. The current economic crisis combined with the devastating impact of the August explosion has caused another surge of emigration. While leaving is relatively uncomplicated for the many Lebanese nationals who have much-coveted second citizenships, others without this luxury are weighing up their options, including citizenship-by-investment.

Alternatives for others in the region are less promising. As the Syrian conflict approaches its 10th year, the situation remains bleak for most displaced Syrians, particularly those hosted in neighboring countries. UNHCR and other international donor funding repeatedly falls short, and resettlement quotas have significantly reduced. In attempts to stem spontaneous migration, EU countries have used the Covid-19 outbreak as a further reason to protect (close) their borders from new arrivals, leaving Syrians in limbo — not welcome in the countries that currently host them, the EU, or the US. Without financial resources, displaced Syrians have no choice but to remain where they are.

Reviving International Travel Is Vital – But Not at the Cost of Privacy and Equity



Ömer Zarpli and Uğur Altundal

Researchers in Political Science at the University of Pittsburgh in the US and Syracuse University in the US, respectively

International travel has been one of the biggest casualties of the global pandemic. Over the last six months, demand for travel has dropped dramatically due to the restrictions imposed by many countries, as well as voluntary decisions by individuals to avoid travel. To rekindle demand and ensure the safety of passengers, governments and airlines have enforced certain measures such as compulsory facial masks, social distancing, additional cleaning and disinfecting, and medical screening. Partly as a result, airline traffic has recovered somewhat. For instance, the number of travelers using airports in the US in September increased approximately sevenfold from its nadir in mid-April. However, the graph shows that it is still less than half of what it was at the same time last year.

> “*The use of digital surveillance to classify people into risk categories would necessitate border securitization and normalize travel restrictions, undermining the great progress that has been made in travel freedom globally over the last few decades. Moreover, immunity passports could further widen the global mobility gap that already disadvantages lower-income countries*

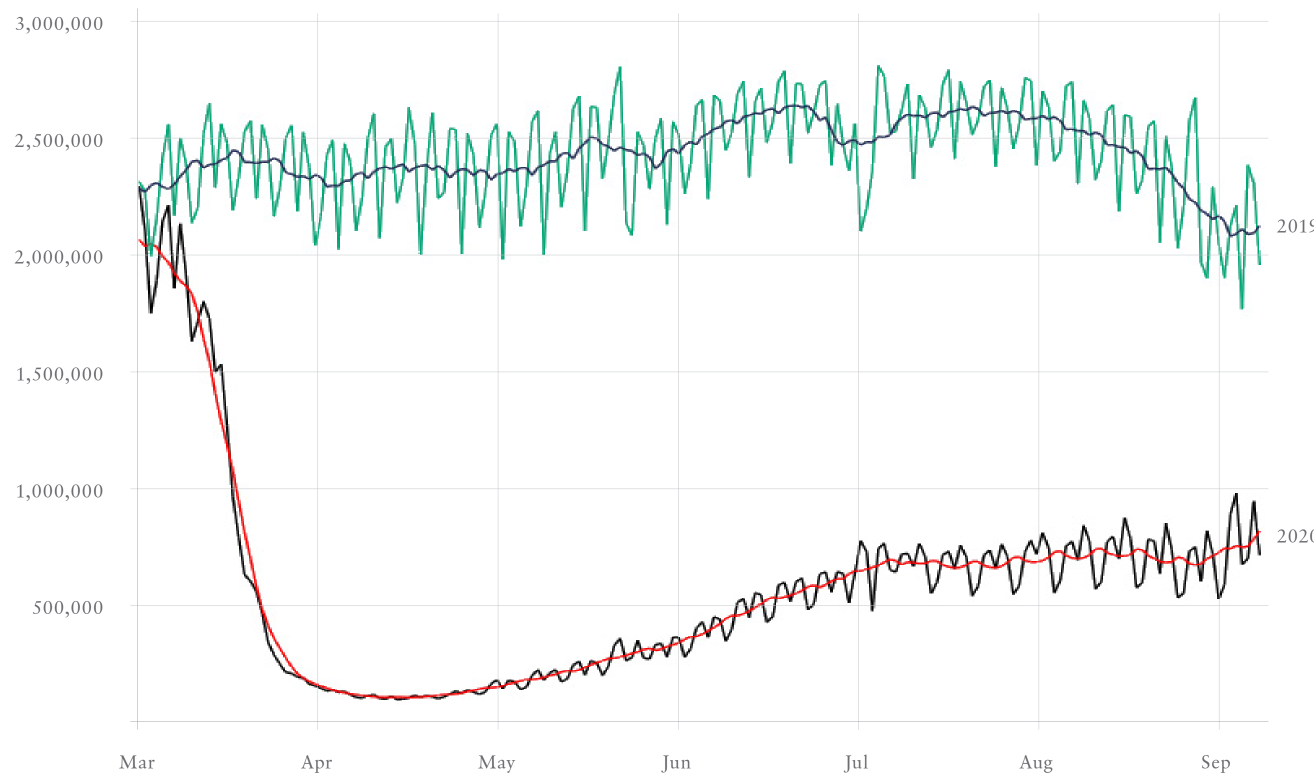
The question remains as to whether international travel can fully recover to pre-pandemic levels in the absence of a widely available vaccine, and given the uncertainty regarding whether or when a vaccine can or will be developed, alternative solutions have been offered in the interim. In addition to restricting the entry of certain nationals, many countries including Mexico, Turkey, and the US scan certain passengers' temperatures and ask them to complete a health questionnaire, depending on their origin, transit, and destination countries. Some countries such as China and Greece and many tourist destinations such as Antigua and Barbuda, the Seychelles, and the US Virgin Islands additionally require negative polymerize chain reaction (PCR) tests from foreign visitors.

Numerous private companies already offer rapid testing units that provide results in anything between fifteen minutes and three hours at certain international airports, including the John F. Kennedy International Airport in New York, Frankfurt Airport in Germany, and Istanbul Airport in Turkey. Needless to say, testing methods (namely, diagnostic tests versus antibody tests) and costs are topics that require further discussion.

In addition, some have proposed the idea of 'immunity passports'. It is argued that individuals who can document that they are virus-free or that they have developed antibodies should be allowed to travel more freely both domestically and internationally. This is possible by linking the immunization status of individuals to their biometric passports. Although this can potentially help mitigate the spread of disease by minimizing the disruptions to international travel, it also harbors potential risks.

Most importantly, there is no scientific consensus on whether antibodies offer protection against the virus, and if they do, the amount that is required for protection, or how long the

Transportation Security Administration Checkpoint Transits (2020 versus 2019)



Note: The trend lines in the graph represent five-day running averages.

Source of data: www.tsa.gov/coronavirus/passenger-throughput

immunity will last. Further, there are risks of false negatives in PCR tests and false positives in antibody tests. In fact, researchers have found that only a small fraction of antibody tests on the market consistently provide reliable results.

Immunity passports also raise important privacy issues. They would grant governments and private companies greater access to passengers' health records and medical information, potentially allowing them to compile comprehensive records of people's intimate details. The use of digital surveillance to classify people into risk categories would necessitate border securitization and normalize travel restrictions, undermining the great progress that has been made in travel freedom globally over the last few decades. Moreover, immunity passports could further widen the global mobility gap that already disadvantages lower-income countries. Healthcare infrastructure and testing capacity are inadequate in many countries, with only a fraction of the population having access to testing and the remainder being potentially disadvantaged. All of this could make travel freedom even more inequitable than it already is.

Achieving healthy and safe air travel during a pandemic with no vaccine is no easy feat. There is no tried and tested model to emulate. But any approach to address this issue should balance economic and health concerns, while minimizing the unintended consequences, especially in terms of privacy and equity.

Covid-19 Accelerates the Rise of Digital Nomad Visa Options

Greg Lindsay

Director of Applied Research at NewCities in Canada

Estonia may be best known — at least for those in the know — as the nation that rebooted itself in the cloud. Boasting the world's most ambitious and secure Internet infrastructure, the nation issues its citizens digital identity cards with access to thousands of services — including paying taxes in minutes. In 2015, the government elected to make these available to non-citizens. E-residency entitles entrepreneurs to bank or incorporate in Estonia (and thus within the EU) but not to enter the country, and today there are around 70,000 e-residents of Estonia who have no intention of relocating there, including me.

Originally pitched to global nomads and free agents, e-residency proved popular enough that last year Estonia began hinting at issuing a one-year 'nomad visa' offering entry to the country itself. After the pandemic hit, overnight the world's knowledge workers became temporary professional nomads, and the disparity between national responses threw into stark relief the comparative advantages of alternative citizenship — especially for Americans suddenly locked out of much of the world.

Whereas once investment migrants were typically high-net-worth individuals in search of greater mobility, today an increasing number are well-compensated professionals desperately seeking a Plan B for affordable healthcare and their children's education, at least until a vaccine becomes available. (For instance, I, along with many other Americans, now reside in Canada. According to recent reports, nearly a third of Americans are threatening to move to Canada if November's presidential election doesn't go their way.) The increasing desire for alternative options has in turn given rise to a new class of visas that may prove to be the gateway for a new breed of middle-class migrants who are keenly aware of other nations' successes (or failures).

By the time Estonia began accepting nomad applications in August, for example, it was no longer the first — Barbados had unveiled its one-year 'Welcome Stamp' in July, attracting more than 1,000 inquiries the first week. Bermuda and Georgia were not far behind, both finding plenty of takers. (This is in addition to the doubling of Americans inquiring about secondary citizenship in the first half of the year.)

Where digital nomads differ from classic investment migrants is in the talent they bring to their hosts. Nomads are invited to reside and consume, funneling overseas salaries into the economies of Tallinn and Tbilisi. Is this the new frontier of the global creative class, wooed by governments as they hop from one pandemic- and climate-crisis oasis to the next?

Investment migration paved the way for competitive residency, but once again the benefits of innovation are trickling down — EUR 1 million or even USD 100,000 for alternative citizenship is too steep a price for many; EUR 100 for a year in Estonia is the perfect price to give one a taste. After all, once one has adjusted to working- and schooling-from-home, why stop at leaving Manhattan for the mountains when one can decamp to a country where the virus is under control? Nomad visas are only the start.

Caribbean Innovations to Counteract Covid Tourism Slump

Dr. Suzette A. Haughton

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In 2019, Caribbean travel and tourism contributed approximately USD 59 billion to the region's gross domestic product. By contrast in 2020, the World Bank's recent forecasts indicate that Covid-19 will push the Caribbean region into recession as countries struggle to manage the pandemic against the background of significant decline in economic activity. Across most Caribbean states, a range of policy options were adopted to minimize the spread of Covid-19, such as border closures and the restriction of human cross-border movements. The instant economic effect was noticeable — there was a deluge of job losses and hotel closures.

Antigua and Barbuda, Dominica, Grenada, St. Kitts and Nevis, and St. Lucia have long offered attractive citizenship-by-investment (CBI) programs from which they earn significant revenues. For instance, in 2019, the Antigua and Barbuda Citizenship-by-Investment Program generated XCD 98.8 million (around USD 36.6 million at the current exchange rate), while the St. Lucia Citizenship-by-Investment Program has raised XCD 131.2 million (around USD 49 million at the current exchange rate) since 2016. With such significant revenues from mobility and investment migration programs, it is vital that Caribbean states reopen to the global financial markets.

From the beginning of June, some island nations began to reopen their borders to facilitate mobility of citizens and tourists and for resettlement purposes. The easing of restrictions to international travel indicates their commitment to global mobility and to restarting their economies. In May, St. Lucia was the first Caribbean country to announce a new Covid-19 Relief Bond option for a limited time in response to the coronavirus pandemic. Then in mid-July, Barbados announced a program to boost visitor arrivals by issuing a 12-month 'Welcome Stamp' that allows visitors to work remotely from Barbados for up to a year while enjoying the white sand beaches and island life. Others in the region may well follow suit.

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Important developments to watch for in the upcoming quarter and beyond, therefore, concern further innovations by Caribbean states in efforts to increase visitor mobility and extend existing investment migration options. Catalysts that could drive the Caribbean investment migration industry to record levels in the future — thus supporting the region's post-pandemic economic recovery — could well be the marketing of CBI programs as contractual safety nets in safe-harbor island nations that have been less severely affected by Covid-19, the promotion of the region as an attractive relocation and vacation option thanks to its remoteness and its clean air, and an increase in the number of long-stay visas on offer.

Africa Could Surprise Again If Mobility-Enhancing Reforms Are Implemented Swiftly

Justice Malala

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Africa was expected to bear the brunt of the Covid-19 pandemic. In May the World Health Organization predicted that nearly a quarter of a billion people across 47 African countries would contract Covid-19 over the next year because of its weak health systems and a population disproportionately affected by infectious diseases.

It did not happen. Thanks to public health interventions and a young population among other factors, by late September there were 1.3 million confirmed infections and 1.1 million recoveries on the continent, according to the Africa Centres for Disease Control and Prevention.

Can this success story be replicated as the continent now turns to fixing its economies? The IMF projects that Africa's GDP will plunge from 3.2% to -2.8% in 2020. Africa will lose between USD 53 billion and USD 120 billion in contributions to its GDP in 2020 because of the crash in tourism alone, according to the World Travel and Tourism Council. Collapses in the oil price and vertiginous drops in demand for agricultural exports have devastated economies from Nigeria to Kenya.

The speed of economic recovery will largely depend on Africa's ability to return to pre-pandemic mobility levels rapidly. Mobility will continue to be severely curtailed in unpredictable ways, and economic revival is uncertain. Nothing illustrates this quite like South Africa opening its international borders on 1 October after a severe lockdown, with all travelers from Africa welcome (due to Africa's low Covid-19 infection rates) while visitors from developed countries such as the US, who in the past waltzed through borders, are designated as presenting a greater risk of virus spread and face severe restrictions. South African Tourism says it will take 24 to 30 months for tourism activity in the country to recover.

US–China trade and political rivalry is intensifying. Policy uncertainty about Africa in both jurisdictions may delay crucial investment decisions at a time when the continent needs it most. The UN Conference on Trade and Development predicts that foreign direct investment flows to Africa will contract by 25%–40% in 2020.

Mobility of African talent will be affected by new policies brought on by the pandemic — or by exploiting it. In June, the US extended a freeze on green cards for new immigrants and suspended new visas for skilled workers, for example. The consequences are obvious: The World Bank predicts that remittance flows to sub-Saharan Africa will shrink by 23.1% this year.

South African and Nigerian billionaires, Johann Rupert and Tony Elumelu, say the pandemic presents an opportunity to 'reset' Africa. That 'reset' is within Africa's grasp if the African Continental Free Trade Area (AfCFTA) is implemented with some vigor by African leaders — immediately.

With 54 African Union member countries signed up, AfCFTA creates a single market of 1.3 billion people. It could bolster Africa's income by USD 450 billion and lift 30 million people out of extreme poverty by 2035, says the World Bank. To achieve this, Africa's leaders need to implement domestic policy reforms energetically — particularly those aiding the movement of capital and people — to facilitate the necessary trade and attract investment.

If AfCFTA implementation succeeds, then a second surprise — similar to its successful fight against Covid-19 — may be in store from Africa. It will require intense work and decisive leadership.

Economic Community and Cross-Border Co-Operation Are Key to Covid Recovery

Curtis S. Chin

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 in Virginia in the US

Government-imposed economic shutdowns have seemingly accelerated the unraveling of globalization, barring leisure and business travelers — regardless of their passports — from once frequently visited destinations. In New York, London, Bangkok and other cities that were once among the world's most visited, restaurants and small businesses have closed and airports have emptied.

Yet, there remains hope for better days ahead.

Critically, progress continues in the search for medical solutions to the ongoing pandemic. US election-year rhetoric should not obscure either steps forward or missteps in the Covid-19 battle. (As of 1 October 2020, there were 316 treatments and 213 vaccines being tracked by my Milken Institute colleagues in a widely cited 'Covid-19 Treatment and Vaccine Tracker', using an aggregation of publicly-available information from validated sources). From telehealth and online learning to now ubiquitous Zoom meetings, technology has played a critical role in mitigating today's limits on local, national, and global mobility.

However, even before a vaccine is developed, more attention must be paid today to shaping innovative economic responses to Covid-19's impact. One example is efforts by destinations such as Bermuda and Croatia to explore longer-stay visas for visitors who meet existing health and travel requirements. Think not just staycation, but 'workation', as countries innovate to attract coronavirus-free digital nomads committed to stay for a while, with money to spend or capital to invest.

And Southeast Asia could well provide an example of expanded, pandemic-driven regional cooperation building on the existing foundation of the Association of Southeast Asian Nations (ASEAN) Economic Community (AEC), established in December 2015 by the 10 ASEAN member states (Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand, and Vietnam) as a move towards a globally competitive single market and production base. This included a commitment to freer — if not quite free — movement of goods and services, labor, capital, and investments across the region.

Much might be aspirational given the diversity of the 10 nations. This is underscored by the October 2020 Henley Passport Index, whose ranking of ASEAN nations ranged from Singapore in 2nd position (with visa-free access to 190 nations) to Myanmar in 93rd position (with visa-free access to only 47 nations).

One thing is clear, however. Regardless of when the pandemic ends and of who sits in the White House in 2021, ASEAN matters. Covid-19 and changing travel policies will not change Southeast Asia's growing importance.

ASEAN encompasses a GDP of USD 2.8 trillion and is home to more than 650 million people — a population larger than that of all but two countries. The US remains the largest investor in this strategically important region, having invested more in the ASEAN region than its combined investment in all the BRIC nations (Brazil, Russia, India, and China), according to the US-ASEAN Business Council.

Strengthening and building on existing cross-border business, investment, and other financial relationships must be a key part of a sustainable solution to the pandemic's consequences. Economic community matters even more in the coronavirus era, and Southeast Asia could well show the way.

Strongest Passports in Q4 2020

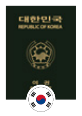
1st
Visa-free access to 191 destinations


Japan

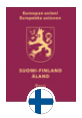
2nd
Visa-free access to 190 destinations


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 Q4 2020

102nd
Visa-free access to 33 destinations


Somalia
+

Yemen

103rd
Visa-free access to 32 destinations


Pakistan

104th
Visa-free access to 29 destinations


Syria

105th
Visa-free access to 28 destinations


Iraq

106th
Visa-free access to 26 destinations

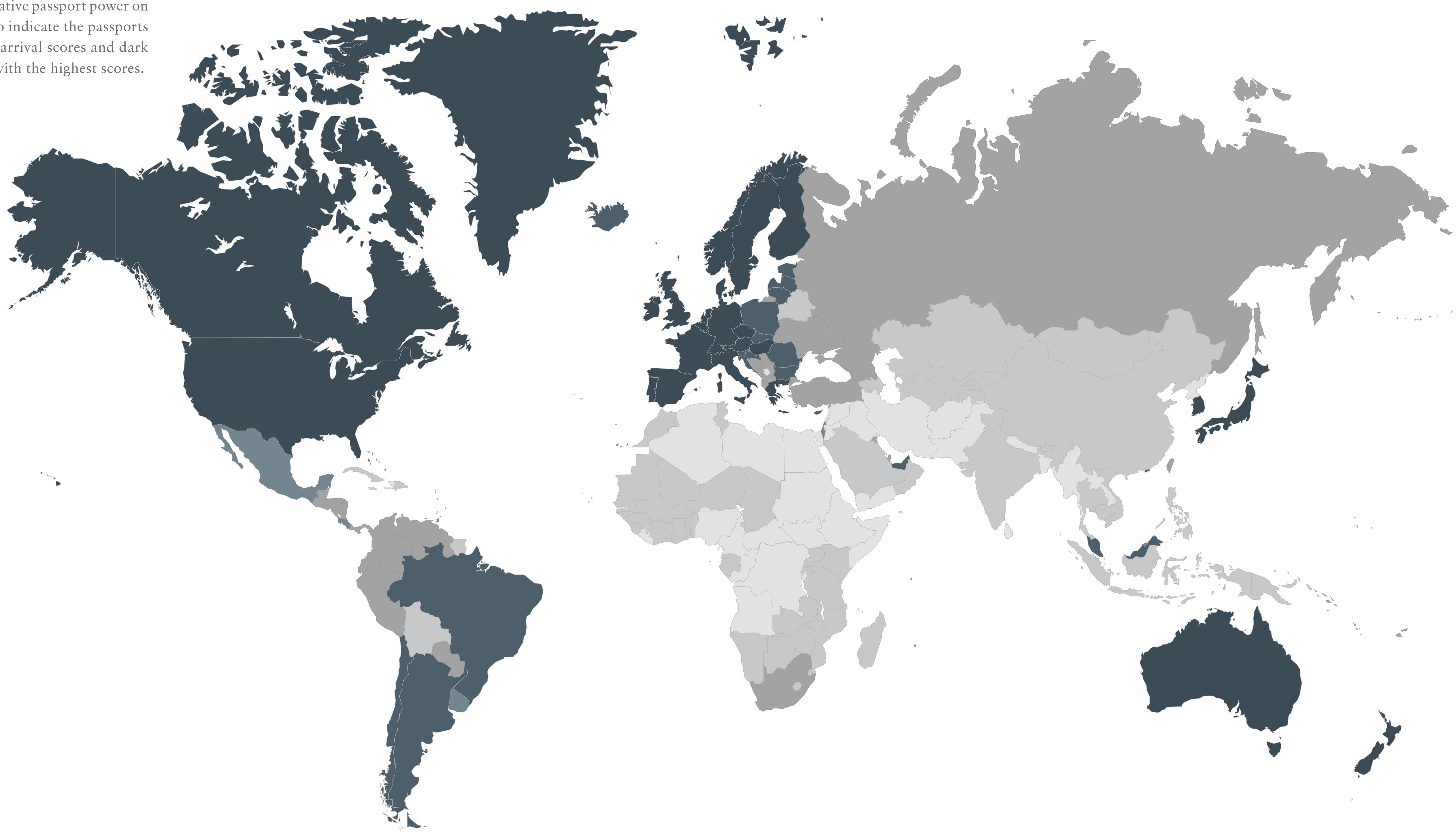

Afghanistan

Japan steadfastly remains in the top spot on the Henley Passport Index in the fourth quarter of 2020, with a visa-free or visa-on-arrival score of 191. Singapore sits in 2nd place with 190, and Germany and South Korea hold joint-3rd place, with their citizens able to access 189 destinations around the world without a prior visa. At the other end of the global mobility spectrum, the Afghan passport remains the world's weakest, in 106th place, with a visa-free or visa-on-arrival score of just 26.

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.

Passport Power Worldwide

This map shows the differences in relative passport power on a global scale, with light gray used to indicate the passports with the lowest visa-free or visa-on-arrival scores and dark blue used to indicate the passports with the highest scores.



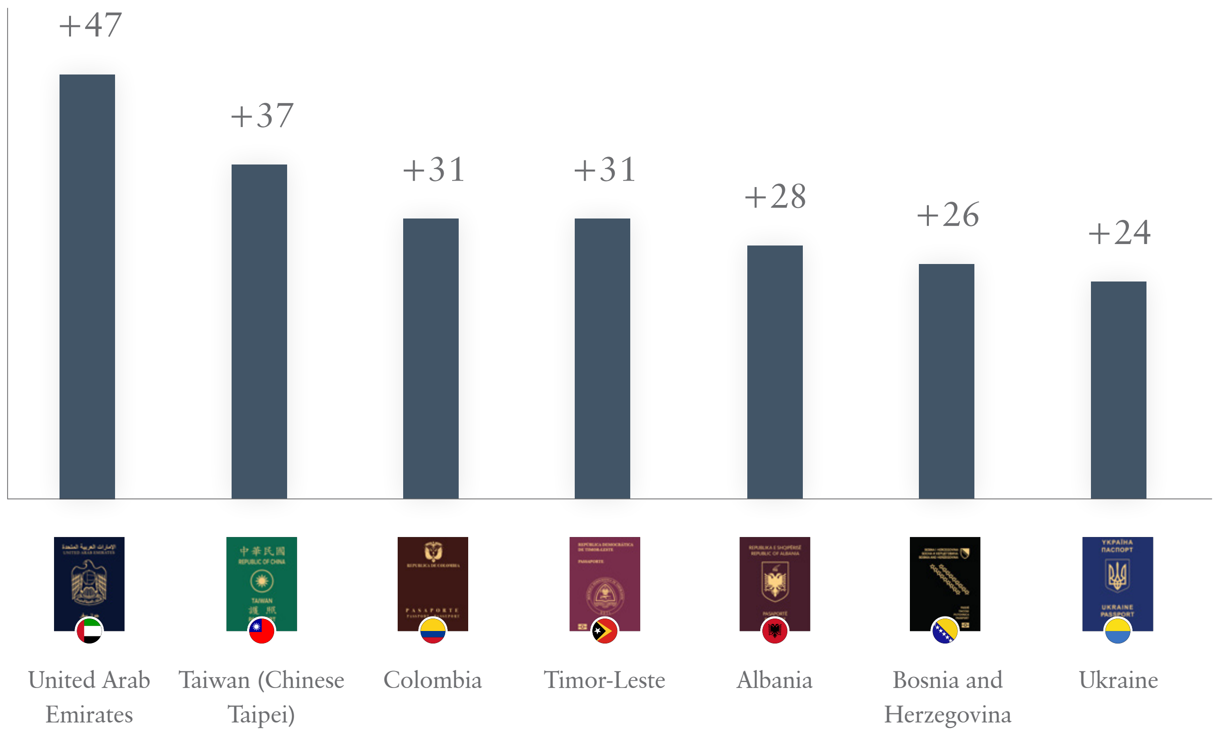
Passport rank

- 1–10
- 11–20
- 21–30
- 31–60
- 61–90
- 91–106

Disclaimer: The information provided here reflects the 2020 Henley Passport Index ranking on 13 October 2020, 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: 2010 to 2020

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



	United Arab Emirates	Taiwan (Chinese Taipei)	Colombia	Timor-Leste	Albania	Bosnia and Herzegovina	Ukraine
2020	18	32	42	54	50	48	41
2010	65	69	73	85	78	74	65

Rank

Biggest Climbers Since 2010

	Nigeria	Syria	Libya	Yemen	Sierra Leone	Sri Lanka	Bangladesh
2010	76	87	87	88	64	84	85
2020	94	104	101	102	77	97	98

Rank

Biggest Fallers Since 2010

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The concept of residence and citizenship planning was created by *Henley & Partners* in the 1990s. As globalization has expanded, residence and citizenship have become topics of significant interest among the increasing number of internationally mobile entrepreneurs and investors whom we proudly serve every day.

The firm also runs a leading government advisory practice that has raised more than USD 8 billion in foreign direct investment. Trusted by governments, the firm has been involved in strategic consulting and in the design, set-up, and operation of the world's most successful residence and citizenship programs.

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