ICMPD
International Centre for
Migration Policy Development

ICMPD
Migration Outlook Mediterranean 2022

Six migration issues to look out for in 2022

Key trends, events and priorities

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Six migration issues to look out for in 2022

1. Increased vulnerability of migrants and displaced populations

Already disproportionately affected by the health crisis, migrants and refugees in the region could see their living conditions significantly worsen, a trend that has already been observed in large hosting countries. People displaced by conflicts and security threats in Syria, Iraq, Yemen, Palestine[1], Libya, Ethiopia and Sudan, coupled with the deterioration of local economies and uneven recovery, may put an additional strain on countries' abilities to meet the protection needs of migrants and displaced populations in the region. Such strain shall be particularly acute for Lebanon and Jordan who are hosting the highest per capita number of displaced persons globally.

2. Irregular migration along the Mediterranean

The sharp surge in illegal border crossings observed particularly in the **Central Mediterranean Route**, where numbers have more than quadrupled since 2019, is unlikely to abate. Political instability and enduring conflicts in the Darfur and Tigray regions might lead to an influx of asylum seekers and migrants in North African countries and on the Mediterranean routes to Europe. The delicate economic and political situations in Tunisia and Libya, the multifaceted crisis in Lebanon, and disputes in the Sahel could further increase the number of people moving to other countries in the region and irregularly transiting to Europe.

3. Turmoil in the wider neighbourhood

The Nile river dam controversy – Ethiopia's controversial mega dam on the Nile meant to become the largest hydroelectric infrastructure in Africa once completed – continues to be the source of a diplomatic conflict between Addis Ababa and the downstream countries, Egypt and Sudan. If the current negotiations held under the aegis of the African Union deteriorate, disputes relating to the exploitation of the **Nile river water supply** (coupled with the effect of climate change on agriculture) in Egypt and Sudan could further increase the number of people moving to other countries in the region and irregularly transiting to Europe. At the same time, the persistence of civil unrest in **Sudan**

[1] This designation shall not be construed as recognition of a State of Palestine and is without prejudice to the individual positions of ICMPD's Member States on this issue

triggered by the coup of October 2021 continues to destabilise the nation. If efforts by the international community to de-escalate the conflict prove fruitless, the current situation could deteriorate and lead to a wider humanitarian crisis, thus potentially triggering further displaced populations.

4. Growing tensions in Libya

Parliament has not yet given the green light to the Electoral Commission to organise the election, initially rescheduled for 24 January 2022. The rules governing the elections and process are still subject of contention and debate, which could lead to escalating tensions, thus potentially endangering the already extremely fragile state of stability in the country. The flow of migrants and asylum seekers entering Libya's porous southern borders, combined with the increased numbers of, often deadly, attempted crossings along the Central Mediterranean Route, 90% of which leave from Libya, means that political developments in 2022 – including but not limited to the run-up and outcome of the election – are likely to have ramifications on migration and international cooperation at large.

5. Severe economic crisis in Lebanon

Since 2019, Lebanon has plunged into an unprecedented economic crisis with nearly 80% of the population living below the poverty line. This crisis has already triggered the largest exodus since the civil war in 1975, quadrupling the number of Lebanese who left the country since 2018 (around 17 out of 1000, compared to 4.5 in 2018). Whilst the resumption of negotiations with the International Monetary Fund (IMF) in early 2022 represent a glimmer of hope for economic recovery, the prospect of continued economic stagnation may be a driver for further emigration and secondary movements of refugee populations residing in the country towards greener pastures.

6. Social and political challenges in Tunisia

The continuous unstable economic situation, including a slow recovery from the damaging impact of the pandemic, could exacerbate social tensions in the country. This, coupled with the uncertainty of the current political situation due to culminate in parliamentary elections scheduled for December 2022, could continue to represent one of the main drivers of emigration, particularly for youth seeking better prospects.

Introduction

Whilst strategically paramount to the EU's external dimension of migration, for the Southern Mediterranean countries, migration remains a low salience issue compared to security, economic and social concerns.

This divergence of political priorities sets the context for a complex relationship between the EU and its Southern Neighbourhood, representing an additional challenge when it comes to shaping a revitalised partnership on migration, as called for in the new EU political agenda[2], inviting migration actors to reflect upon this realty to usher a new era of ambitious yet pragmatic cooperation.

Encompassing North Africa and the Middle East, this region has an extremely heterogeneous migration landscape. People displaced by the Syrian Civil War, the persistent insecurity in Libya, the continued displacement of Palestinians and arising conflict in neighbouring regions of Sahel and the Horn of Africa, make the Mediterranean **a major region of destination, transit and origin of migrants worldwide**.

Two countries, Lebanon and Jordan, **host the largest number of refugees per capita globally**. The region also includes countries of origin for skilled and unskilled workers, many of whom remain in the region, while others emigrate to Europe or the Gulf. Lebanon, Jordan, and Libya have long traditions of being countries of destination for workers from the Philippines, Indonesia and Sub-Saharan Africa. The Libyan economy for instance greatly depends on foreign labour in various sectors.

Furthermore, **emigration**, particularly to Europe, continues to shape the regional landscape, with about half of all international migrants from North Africa residing in Europe. In 2020, an estimated 1.7 million Algerians, 1.6 million Moroccans and 530,000 Tunisians lived in Western European countries.

This publication provides a regional perspective to ICMPD's Migration Outlook 2022, delving into key current and emerging migration trends in the Mediterranean region, with a focus on North Africa and Middle East. The report highlights a non-exhaustive list of possible scenarios for migration trends that may affect the region in the coming year.

Focus regions

The Mediterranean region continues to assert its influence in the migration landscape. Ten years after the Arab Springs, 2021 continued to be marked by political and economic hardship and crises. Intensifying tensions at the national and regional context are anchored in prevailing and structural political fractures, democratic deficits and existing conflicts and only aggravated by economic hardship and imbalances exacerbated by the COVID-19 pandemic.

[2] European Commission (2021) Joint Communication to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions: Renewed partnership with the Southern Neighbourhood: A new Agenda for the Mediterranean

This section provides a brief analysis of the situation in a select number of countries of potentially high relevance on the migration situation in the region, and beyond. The section offers a specific focus on Tunisia, drawing on findings from the first national survey on international migration published in 2021, also as illustration of the wider complexity and nuance of the migration scenario at play.

Tunisia

Ten years after its revolution, Tunisia's path in terms of democratic transition was seriously tested in 2021, with the resulting unclarity putting its precarious socio-economic situation in further instability. The suspension of Parliament by Presidential Decree on 25 July raised concerns among the international community and polarised local opponents and supporters. The nomination of a new Prime Minister, Najla Bouden Romdhane, in October may have partially deferred criticism and gone some ways to restore confidence of investors and institutions, including the International Monetary Fund (IMF). A public consultation is being organised in the first quarter of 2022 to harness popular support for constitutional amendments to pave the way for parliamentary elections scheduled for 17 December 2022.

The economic situation remains perilous, with the government presenting, on 28 December 2021, a budget with a 6 billion Euro deficit to revive an economy that has been heavily affected by the COVID-19 pandemic and in particular by its impact on the tourism sector. According to IMF estimates, the projected GDP growth of 3.3% in 2022 would be insufficient to absorb this economic downfall.

This situation represents a driving force, particularly for young Tunisians to leave the country for better prospects by whichever means available. In 2021, the number of apprehended Tunisian nationals arriving in Europe (primarily to Italy and Spain) increased by 43.9%. which was five times higher than two years earlier. In total, UNHCR data report a 61% increase in irregular sea departures from Tunisia in 2021 when compared to the figures of 2020 (namely 36,828 in 2021 as opposed to 22,900 in 2020). An innovative trend of self-smuggling, whereby individuals procure their own means rather than relying on criminal networks to reach European shores irregularly has been observed and may intensify as the driving causes for this emigration persist.

This continuous unstable economic situation could exacerbate the current social tensions and thus continue in the coming year to represent one of the main drivers of irregular migration towards the EU countries.

Tunisia in focus – results from 2021 National survey

From 2020 to 2021, Tunisia carried out its first census on international migration, Tunisia-HIMS, with support from ICMPD under the EU-funded ProGreS Migration project. Key findings from this report, published in December 2021, are hereby summarised along with complementary information regarding the situation of migration in Tunisia.

The migration landscape of Tunisia is characterised by strong emigration brought on by the prevailing socio-political situation, and a significant diaspora population. At the same time, Tunisia is experiencing increasingly heterogeneous immigration, including increased arrivals of populations seeking asylum.

In 2021, there were 59,000 foreigners residing in Tunisia[3] (less than 1% of the overall population) coming mainly from the Maghreb (37%), other African countries (36.4%) and Europe (18.5%). The number of foreigners residing in Tunisia has increased by more than 10% since 2014 (53,490 individuals according to the 2014 population census), although a downward trend was observed during the COVID-19 pandemic. The immigrant population originating from African countries outside the Maghreb had registered the strongest growth in recent years, increasing from 7,200 individuals in 2014 to 21,466 in 2021. Reasons for immigrating include family (36.6%) followed by employment (29.2%) and studies (15.5%).

In 2021, there were 9,255 refugees registered with UNHCR in Tunisia an increase from 6,057 registered in 2020 (3,763 new registrations from January to November 2021 versus 2,929 registrations in the same period in 2020, an annual increase of 28%). 55% of these were from Southern Africa.

1.7 million Tunisians have declared an intention to emigrate. Emigration is motivated predominantly by socio-economic reasons (78.4%), and preferred destinations include France (41.7%), Italy (10.3%) and Germany (9.5%), with the most common profile being a young man aged between 15 and 24, single, educated and unemployed, and living in Greater Tunis or in the Centre-East or South-East of the country. Of these, 14.3% declared having taken specific steps to emigrate, and 5.5% are willing to consider irregular migration if their visa application is unsuccessful.

[3] Persons of foreign nationality holders or not of a residence permit in Tunisia.

There are an estimated **566,000 Tunisians residing abroad**[4] (68.6% men and 31.4% women). Three European countries host 74.8% of all Tunisian migrants: France (52.5%), Italy (14.1%) and Germany (8.2%). The main reasons for departure for Tunisian migrants were employment (45%), family reunion (32%) and studies (11.5%). More men than women left for professional reasons (58.6% versus 15.5%). The main reason given by women for leaving was family reunion and marriage (68.8%). An analysis of the field of specialisation of Tunisian migrants revealed that over the 2015-2020 period, 39,000 engineers and 3,300 doctors have migrated for job opportunities abroad.

Morocco, Algeria

As the African country closest to Europe, encompassing two land borders with Spanish autonomous cities, Morocco's strategic geopolitical location continues to expose the country to migratory pressure, often leading to tensions along its borders.

In Morocco, the trend of increased immigration continued in 2021, with an estimated increase of migrant stock of nearly 10% between 2020 and 2021.

Whilst along its Northern border estimated arrivals to Europe along the Western Mediterranean Route did not increase significantly, the aforementioned strategic location of Morocco was manifested in May 2021 when an estimated 8,000 migrants entered Ceuta from Morocco over the course of a day. This incident occurred in the midst of diplomatic tensions over a dispute on a decision of Spain to admit the Western Sahrawi leader for medical treatment.

Along its Eastern border, tensions between Morocco and Algeria escalated with diplomatic relations halting following the closing of the gas pipeline that passed through Morocco by Algeria due to alleged implications of Morocco in the death of three Algerian nationals in the disputed Western Sahara region. It remains to be seen whether tensions will continue to escalate in 2022, but if they do, this could have implications on displacements and irregular crossings between these countries and towards Europe (Spanish authorities stated that Algerian nationals represented 73% arrivals to their country during the first half of 2021).

Libya

Libya's past unpredictable migration policy towards African and Arab nationals, its strategic location as a gateway between the Sahel, sub-Saharan region and the Horn of Africa and southern Europe, its vulnerable and vast land and maritime borders and ongoing conflict and economic turmoil, render it a critical player in the Central Mediterranean migration Route towards Europe. 90% of migrants using this route across the Mediterranean leave from Libya.

[4] Any person of Tunisian nationality, aged 15 years and over, having initially resided in Tunisia and residing currently in another country for a period of at least three months

In 2021 Libya continued to be a hotspot for mixed migration flows. Between July and September 2021, an estimated 200,000 internally displaced persons (IDPs) and over 40,000 refugees were registered. Furthermore, the country is host to over 610,000 migrants (around 8% of the total population) from over 44 nationalities but mainly from Niger (20%), Egypt (18%), Sudan (15%) and Chad (14%). This number is slightly below pre-pandemic levels.

Following near decade-long challenges, division and conflict experienced in Libya, the Government of National Accord (GNA) and the Libyan National Army signed a Ceasefire Agreement in October 2020, and, while its implementation was not absolute, the cessation of large-scale hostilities allowed for the formation of the Government of National Unity (GNU) in March 2021. Since the signing of the agreement, the humanitarian situation has improved and the number of IDPs has decreased by nearly 25%. In a period of relative political stability and a remarkable rebound of the hydrocarbon sector in 2021 Libya's economy saw an exponential growth, projected to reach over 78% in the year.

Notwithstanding, the unemployment rate remains high (around 23%), and 800,000 people are believed to be in need of humanitarian assistance, with 1 in 5 migrants suffering from food and water insecurity. This precarious situation could see a continuing trend towards increased sea departures, as observed in 2021 which saw an increase by 150% of irregular sea departures from Libya when compared to 2020 (67,799 in 2021 from 27,120 in 2020).

Although the Ceasefire Agreement brought a temporary end to largescale hostilities, the agreed withdrawal of foreign armed forces has not been implemented to date, while the presidential and legislative elections were postponed to 2022. It remains to be seen if the electoral issue can be resolved by a mutually accepted compromise or if it risks reigniting tensions, endangering the fragile political stability in the country. Disputed election results might also have an impact on migration from and through Libya, as well as on Libya's capacity to cooperate with the EU and the international community on migration issues.

Lebanon

Lebanon's geographic position – bordering Syria and Israel by land and having Turkey and Cyprus as its nearest overseas neighbours – puts the country at the heart of geopolitical tensions that have seen renewed impetus in 2021. As a consequence of the Syrian war, Lebanon became the country hosting the largest ratio of refugees per capita, hosting an estimated 1.5 million Syrian refugees, about half of them registered with the UNHCR.

Moreover, recent developments pose increasing challenges in this regard, as UNHCR estimates that nine out of ten Syrian refugees live in extreme poverty in Lebanon, up from 55% in 2019, while increased challenges in obtaining legal residency aggravate their precarious situation.

This trend concerns not only refugees in the territory but also the general population at large, with 41% of households in Lebanon reporting challenges to access basic needs and with the unemployment rate on the rise.

Lebanon has experienced multifaceted political, social, economic and financial crises in recent years, which were aggravated by the COVID-19 pandemic and the Beirut port explosion of August 2020. The socio-political aftermath of those events resulted in the formation of a new government in September 2021, 13 months after the resignation of the previous administration. On 24 January, former Prime Minister Saad Hariri announced his withdrawal from the political scene, putting in potential peril a delicate political balance and potentially leading to a wider destabilisation and radicalisation of political factions, despite the prospects of legislative elections expected in May 2022. In this context, the development of migration policies in Lebanon, as well as the formation of cooperation agreements with its partners in the region has proven, and it is expected to continue to prove, challenging.

Lebanon is also experiencing one of the worst economic recessions ever recorded. In 2020, the economy contracted by 20% and is expected to have shrunk by another 10% in 2021. The currency has lost more than 90% of its value and the country is suffering from hyperinflation and food prices soaring up by up to 600%. In this regard, it should be noted that the multifaceted challenges facing Lebanon have already seen a sharp rise in emigration, including in particular but not limited to younger generations, raising inevitable concerns regarding the effects of brain drain while however carrying the potential for increased remittance flows. The departure of considerable share of health care workers, namely doctors, could have potentially long-term destabilising effect for recovery and well-being of the population remaining in country.

Moreover, the scale of the economic downturn has worsened the situation of the estimated 250,000 domestic migrant workers in Lebanon subject to the “kafala”[5] or sponsorship system. In this regard, a June 2021 report from the UN calls for the dismantling of the “kafala” systems on the grounds of the inequalities, exploitation and abuse of migrant workers, and in particular of women migrants, however it remains to be seen whether such calls will play a role in migration policy development in Lebanon for the year to come.

This volatile situation, coupled with potential escalation of conflicts in the country and region can represent a potential source for increased emigration and secondary movements of refugees residing in Lebanon towards Europe and other destinations.

Migration trends in the region

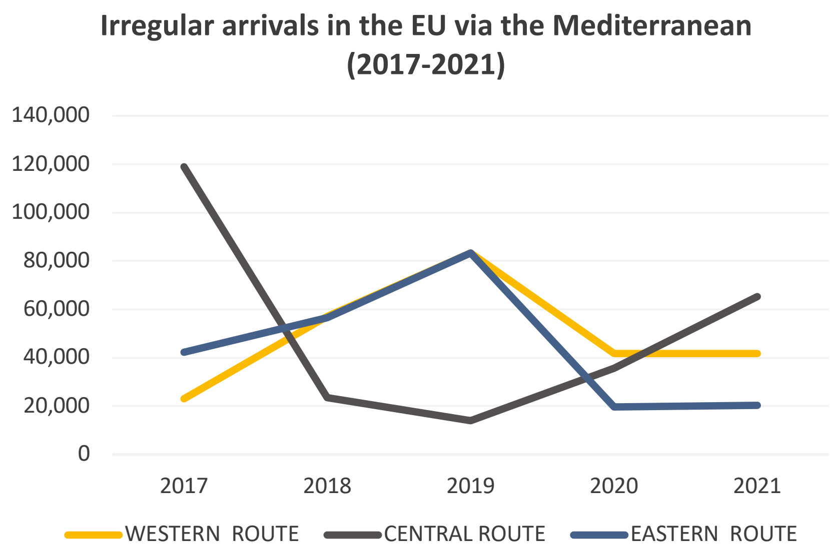
Throughout 2021, the Mediterranean region has been characterised by mixed migration flows directed mainly to Europe and originating in, and transiting through, North Africa and the Middle East. A large presence of forcibly displaced migrants has continued to be registered in several countries within the

[5] The term refers to a legal framework defining the relationship between migrant workers and their employers in all Arab Gulf states.

region, predominantly as a consequence of conflicts in Syria, Iraq, Yemen and Libya, and of newly emerged security threats and conflicts in Ethiopia and Sudan. In addition, socio-economic turmoil including the devaluation of local currencies, rising unemployment, political instability and the devastating impact of the COVID-19 pandemic have strongly affected the Mediterranean region and likely contributed to the following migration trends.

Irregular migration

In 2021, over 125,000 migrants reached Europe across the Mediterranean irregularly, travelling largely by sea through the Central and Western Mediterranean Routes, mainly from Libya/Tunisia to Italy and from Morocco to Spain respectively. This figure shows that there was roughly a 30% increase from the number of irregular arrivals registered in 2020, indicating **a return to pre-pandemic figures comparable with the number of arrivals recorded in 2019**. A sharp surge in illegal border crossings was observed particularly in the Central Mediterranean Route where numbers have more than quadrupled since 2019. This consolidated a trend that began in 2020, where irregular maritime migrants gradually shifted from Western and Eastern Mediterranean Routes in favour of the Central Mediterranean Route. The reasons for the shift is likely to be the extended border closures in the Spanish autonomous cities of Ceuta and Melilla in the Western Route, and in the strict border control policies adopted by countries in the Balkans throughout the Eastern Route. Relatedly, interceptions and returns to Libya almost tripled in 2021 compared to 2020.



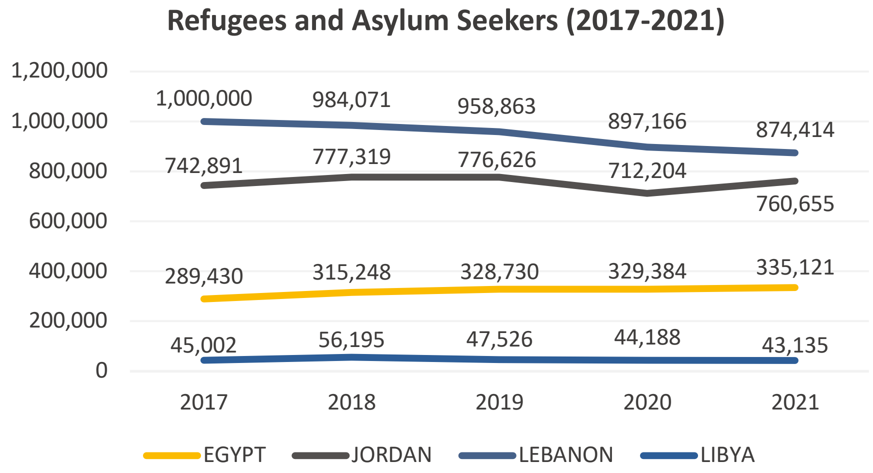
Source: Council of the European Union

With a significant increase from 2019 and 2020, an estimated number of 2,041 people have tragically lost their lives traversing the Mediterranean Sea to reach Europe in 2021.

Over 90% of irregular maritime migrants in 2021 were men and a fifth of all registered irregular migrants were minors. The four most represented countries of origin of irregular migrants apprehended in the Mediterranean region in 2021 were: Tunisia (15,639), Algeria (11,502), Egypt (8,151) and Bangladesh (7,760). While this trend is largely consistent with the data recorded in the past two years, a notable shift occurred with regards to Egyptian and Syrian nationals. **Egyptians became the third most represented group of nationals intercepted in 2021**, whereas they had not been in the top ten nationalities in the last five years. While the cause of this increase is uncertain, a possible driver might be the widespread water scarcity affecting agricultural workers in the Nile Basin which, could have resulted in social problems that gave rise to a surge in irregular migration. By contrast, the number of Syrian migrants using Mediterranean routes dropped from over 18,000 in 2019 to less than 4,500 people in 2021. It should be noted however that this decline, rather than reflecting an easing of the situation in Syria, is rather reflective of a shift in migration routes gaining prominence through Eastern Europe's land borders, as the number of asylum applications lodged by Syrian nationals in the EU went up by 72% between 2021 and 2022.

Refugees and asylum seekers

The Mediterranean region has continued to host one of the largest concentration of refugee populations in the world. The size of the refugee population has remained particularly high in the Middle East and North Africa region, with approximately 2.6 million refugees, 260,000 asylum seekers and 11.5 million Internally Displaced People (IDPs) residing in the region. Moreover, Lebanon and Jordan are the two countries hosting the largest number of refugees per capita globally according to UNHCR data. Official refugee numbers likely understate the burden borne by these two countries, as counting displaced populations of concern within their borders present potential serious threats to stability and sovereignty. Whereas in Jordan this signals a slight increase from the data recorded in the last 4 years, for Lebanon a downward trend is noted with a reduction of over 10% since 2017. This change is likely due to the deterioration of the economic crisis in Lebanon as a consequence of COVID-19 and the Beirut Port explosion which might have pushed refugees and asylum seekers to move to neighbouring countries or to attempt to reach other destinations, including Europe. A significant rise is also notable in Egypt, where refugees and asylum seekers increased from 289,430 to 335,121 in the 2017–2021 period.



Source: UNHCR

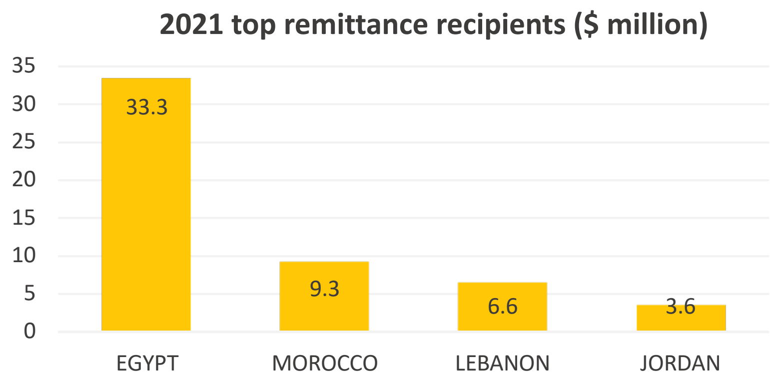
While Syrian refugees are prevalent throughout the region, the other most represented countries of origin of refugees are Iraq (particularly in the Middle East), Palestine, Sudan, South Sudan, Eritrea and Ethiopia. It needs to be noted that the influx of Syrian refugees to neighbouring countries in the region has stabilised, with the number of recorded Syrian refugees for 2021 comparable with the figures of 2018. Refugee returns to Syria have plummeted in the last two years, with only around 3,000 Syrians opting for voluntary repatriation in 2021 from Egypt, Jordan and Lebanon. The total number of resettlement submissions have remained stable, at around 11,000. Also worth noting is the fact that in 2021 Jordan issued 62,000 work permits to Syrians, representing the highest annual number since work permits for Syrian refugees were introduced in 2016.

Remittances

Remittances to countries in the Middle East and North Africa are projected to have grown by an estimated 9.7% in 2021. Specifically, a strong increase was recorded in inflows to Egypt (by 12.6% to $33 billion), with ties to Egyptians living in countries of the Gulf Cooperation Council (GCC)[6], and to Morocco (by 25% to $9.3 billion). While for Morocco the surge is likely driven by economic growth in host countries in the European Union, notably France and Spain, return migration from the Gulf may be driving the increase in remittances recorded in Egypt.

In 2021, remittances accounted for a substantial amount of the GDP of several countries in the region, particularly Lebanon (34.8%), Palestine (16.7%), Jordan (8.4%) and Egypt (8%) and were of crucial importance to counterbalancing the disruption caused by COVID-19 to private revenues across the region. In contrast to the general trend, negative remittance flows were recorded for Jordan (down by 6.9%) and Lebanon (marginally down by 0.3%). Finally, the cost of remittances in the region decreased from 7% to 6.3% between 2020 and 2021.

[6] GCC countries include: Bahrain, United Arab Emirates, Oman, Kuwait, Qatar and Saudi Arabia



Source: KNOMAD

Expected migration trends for 2022

In 2022, the drivers of mobility related to conflicts, socio-economic struggles, and environmental risks will probably continue to have an impact on mobility in the region, although there is uncertainty about how they will develop. While Syrian refugees will remain highly vulnerable, **irregular migration** flows are likely to continue at a similar level to those registered in 2021. UNHCR's latest return intention survey (conducted in March 2021) indicates that while most Syrians wish to return one day (70%), only a small number plan to do so within the following year (2.4%). Nonetheless, political instability in Sudan and enduring conflicts in the Sahel, Darfur and Tigray regions might lead to an influx of asylum seekers and migrants in North African countries and on the Mediterranean routes to Europe. The delicate economic and political situations in Tunisia and Libya, the multifaceted crisis in Lebanon, and disputes relating to the exploitation of the Nile river water supply (coupled with the effect of climate change on agriculture) in Egypt and Sudan could further increase the number of people moving to other countries in the region and irregularly transiting to Europe. These developments are likely to contribute to an increasing trend in **remittances** sent to host economies in the Middle East and North Africa, as migrants from third countries transiting through the region receive supporting remittances from their countries of origin.

Regarding **labour migration**, the continuing impact of COVID-19 on Gulf countries' economies in sectors which traditionally employ a significant number of migrants (such as aviation, tourism, construction and logistics) could force many migrant workers to return to their countries of origin or to choose other migration pathways. The limited capacity of countries in North Africa and the Middle East to absorb an increasingly educated workforce might also increase the likelihood of people seeking employment in countries other than their country of origin, within the region or elsewhere. EU Member States' approach to respond to the challenge of demographic changes and labour shortages, including via use of instruments such as the Talent Partnerships and conclusion of bilateral labour agreements, could also have implications on migration in the region.

Migration policy developments

Countries in the Middle East and North Africa find themselves playing a crucial and complex role in migration dynamics in the Mediterranean region. In addition to their impact as countries of destination and origin for migration, they are also countries of transit and of secondary movements in the route of mixed migration flows towards Europe. Political and socioeconomic trends, as well as migration policy developments along migration routes – such as the relaxation (or restriction) of migration policies in Europe or deterioration (or amelioration) of instability in countries of origin – all are factors that contribute to the migration situation in the Mediterranean. In addition, it is important to note the potential impact that regional migration policy developments may have in 2022. This reality is reflected in the *new Agenda for the Mediterranean* and the *EU's New Pact on Migration and Asylum*, which posit that strengthened cooperation on migration governance in Europe's external dimension is essential to ensure sustainable responses and, as such, is expected to be at the heart of migration policy developments in the region.

Moreover, as 2021 saw the continued spread of the COVID-19 pandemic, it is expected that the pandemic will continue to further impact available paths for regular labour migration and mobility in 2022. This will likely be due to declining job opportunities in Gulf countries and on the increasingly strict entry criteria adopted by many European countries, which significant percentages of the population in countries in the Middle East and North Africa cannot fulfil. This combination of factors may also have an impact on the push for irregular migration to Europe depending on the highly volatile and constantly changing nature of the pandemic, economy and on countries' ensuing policy responses.

A prominent priority area in migration in the region in 2021 was the effort of the EU and its Member States in seeking partnerships with North African countries, such as Tunisia and Libya. The aim of such initiatives was to provide partner countries with resources to "fight human traffickers, engage in managing the borders, to take back their citizens who have left for Europe and to repatriate foreigners in their country who are not refugees", as expressed by EU Commissioner for Home Affairs, Ylva Johansson. This policy trend of seeking cooperation and partnership agreements to externalise migration management along migration routes is expected to continue in 2022, as reaching a final agreement on the New Pact on Migration and Asylum and agreeing on solidarity measures within the EU remained inconclusive. Against this backdrop, when assessing potential migration policy developments in the EU, one needs to assess the role played by the politicisation of migration in a number of national elections in 2022, including in Austria, Hungary, Italy, Latvia, Malta, Sweden as well as France, which is also the country holding the Presidency of the EU for the first half of 2022. The narrative and policy responses to this polarising issue may have direct implications on the migration landscape in the Mediterranean and beyond.

Conclusions for 2022

Operationalisation of the partnership between the EU and its neighbourhood
In order for the EU to achieve its objective of curbing irregular migration flows, a coordinated and consolidated joint effort with neighbouring countries will be required. This spirit is already conveyed in the new Agenda for the Mediterranean and the EU Pact on Migration and Asylum.

On the basis of a survey of migration experts carried out by ICMPD alongside the European Institute of the Mediterranean (IEMed) under the EU-funded EUROMED Migration V (EMM5) and EuroMeSCO programmes, **building economic opportunities and addressing root cause of irregular migration**, together with **countering smuggling and human trafficking of human beings**, were considered the most important policy areas for South Partner countries when cooperating on migration with the EU and Member States. Notwithstanding, it should be noted that for these countries, migration remains a lower priority in comparison to concerns related to security, economic and social affairs.

As such, in order to make cooperation on migration effective, the myriad of political, social and economic challenges outlined in this document will need to be taken into account, as will the competing priorities and reigning regional challenges. To achieve this, cooperation frameworks will thus need to build on the specific priorities and aspirations of each country, including building economic opportunities as well as supporting host countries in addressing the vulnerability of displaced persons and promoting legal pathways, including visa facilitation measures.

The narrative adopted on migration during important European electoral campaigns as well as increased calls, including statements seen throughout 2021 on the EU developing a restrictions on visa policy, can also have an impact on cooperation and the potential instrumentalisation of migration as a viable tool in negotiations with European counterparts.

Irregular migration: a continuous ascendant curve
2021 saw an estimated 30% increase in the number of irregular arrivals to Europe across the Mediterranean Sea compared to those registered in 2020, marking a return to pre-pandemic figures. Continuous political instability in Tunisia, Libya and Lebanon and, to some extent, Algeria, as well as the persistent crisis in Syria and escalation in the wider Sahel region, coupled with sustained economic stagnation with little signs of abating, will likely result in a continued upward trend in irregular crossings of populations seeking to flee conflict and in search of better livelihoods.

The COVID-19 pandemic and its destabilising and continuing effects on key economic sectors can also hamper the economic recovery of economies in the region, thus fuelling migration towards economies that are more performant, including the EU.

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