ICMPD
International Centre for
Migration Policy Development

ICMPD Migration Outlook Mediterranean 2023

Seven migration issues to look out for in 2023

Origins, key events and priorities for Europe

International Centre for Migration Policy Development

Seven migration issues to look out for in 2023

1. Food security and increased costs of living

Restrictions on the export of agricultural produce from Ukraine and Russia severely affected food systems in many Mediterranean countries already weakened by two years of COVID-19 disruptions, and by the effects of climate change and environmental degradation. It is estimated that Russia and Ukraine (combined) supply over 50% of the cereal imports arriving in North Africa and the Middle East. Countries that rely heavily on Ukraine's and Russia's wheat, grain and oil seeds, such as Lebanon, Libya, Egypt and Tunisia, are particularly vulnerable to food price shocks exacerbated by their ongoing economic crises. While it is unlikely that food insecurity and the increased cost of living will constitute immediate drivers of international migration, it is expected that they will act as contributing factors to shaping the aspirations for mobility (both internal and external) of people in the region. It follows that policy developments addressing the supply and affordability of food, particularly in the Middle East and North Africa, are likely to be important factors to consider for migration in 2023.

2. A perceived 'double narrative' on migration

Polls conducted in 2022 indicated an increased public openness in Europe to people fleeing war or oppression, with many taking personal action to support refugees from Ukraine. This widespread narrative generated the necessary enabling environment for EU Member States governments to enact effective policy responses to the Ukrainian crisis. However, at the same time, several commentators in the region and beyond reacted to this shift by highlighting the absence of comparable levels of European solidarity to other displacement situations, particularly from North Africa and the Middle East. The perceived existence of a 'double standard', when it comes to migration narratives and shaping policies, could hence affect future North-South migration cooperation efforts in the region.

3. Climate action and green transitions as migration drivers

Climate change is becoming an issue of higher salience in the Mediterranean region. Firstly, the exposure of the Mediterranean region to desertification, extreme weather events, increasing soil aridity and exhaustion of water sources might incentivise, directly or indirectly, a larger number of people to move within or outside their country of origin. The region is also at the epicentre of a dispute between concerned countries over the use and management of the Nile River that could become destabilising.

Secondly, the international community's call for accelerated economic transitions to low-carbon and renewable energy could have an impact on labour market needs and the composition of the workforce in the region, ultimately leading to increased demand for local and migrant workers with specific 'green' skills and qualifications. A first of its kind, the Green Partnership concluded between Morocco and the EU in 2022 on energy, climate and the environment could signal a renewed focus of policy discussions on finding a balance between fostering the resilience of people affected by climate degradation, thus reducing the impact of climate change as a migration driver, and facilitating people's mobility through the creation of new legal migration pathways for both workers in climate sensitive sectors and people affected by climate change.

4. Protracted displacement and economic crises in the Middle East

Particularly affected by displacement caused by the Syrian conflict – which will enter its twelfth year in 2023 – Lebanon and Jordan continue to be the two countries hosting the largest number of refugees[1] per capita globally. As the number of refugees in the Middle East is likely to remain relatively stable, without major onward movements or large-scale returns in the imminent future, the already outstretched resources of the two host countries, weakened by a multi-faceted economic and financial crisis, could head towards a critical point. Last year already an increased number of irregular boat departures from Lebanon to Cyprus and Italy were recorded. While unlikely to escalate in the short term, if left unaddressed, these trends might pose relevant threats to the stability of the region in the future.

5. New migration partnerships

A number of new North-South migration partnerships covering different policy areas were established last year. Covering a range of areas from irregular migration to labour markets, these partnerships represent an attempt to address needs and socio-economic realities on both shores of the Mediterranean. Morocco and Portugal agreed on a labour migration framework allowing the recruitment, hiring and admission of Moroccan citizens in Portugal. The Greek and Egyptian governments signed an agricultural deal allowing up to 5,000 seasonal farm workers from Egypt to be employed in Greece for a maximum of nine months. The EU concluded separate agreements with Egypt and Morocco on border management, anti-smuggling and on environmental and energy issues, and expressed the intention to establish further cooperation schemes with Tunisia and Libya in the near future. Discussions on how to effectively respond to labour market needs, how to tackle the root causes of migration and how to mitigate the perceived risk of 'brain drain' in Southern Mediterranean countries will probably be high on the 2023 migration policy agenda. Moreover, due to increase of migrants staying irregularly in neighbourhood countries, interest in cooperation on return to countries of origin may become an issue of higher salience in migration policy agendas. A further extension of

[1] This document refers to the extended refugee definition as provided under UNHCR's mandate and under the 'OAU Convention Governing the Specific Aspects of Refugee Problems in Africa'. Accordingly, the term 'refugees' includes not only individuals who meet the criteria for refugee status contained in Article 1 of the 1951 Refugee Convention and its 1967 Protocol, but also individuals who are outside their country of origin and who are unable or unwilling to return there owing to serious threats to life, physical integrity or freedom resulting from generalised violence or events seriously disturbing public order.

the migration partnership approach, focusing on reinforcing the capacity of countries in the region to govern all aspects of migration, yields the potential for addressing migration and wider policy challenges in a mutually beneficial way.

6. Tensions in North Africa and the wider neighbourhood

Despite avoiding an increase in the levels of armed violence in Libya over 2022, a stalling in the election process and disagreements between the two rival governments has had an impact on the capacity of Libyan authorities to cooperate with the international community on migration issues.

In the Maghreb, historically difficult diplomatic relationships between Algeria and Morocco have recently escalated to such an extent that diplomatic relations were severed, and a number of economic sectors are affected. While a violent escalation of the conflict seems unlikely, a further decline in the countries' relations has the potential to destabilise the whole region with possible implications on displacements and irregular crossings between these countries and towards Europe. In the region as a whole, the effect of political instability, democratic and governance challenges may further influence people's will to emigrate.

In addition, the fragile security environment in the Sahel and the Horn of Africa are likely to continue operating as a contributing factor to the displacement of people in 2023. Ongoing crises in Burkina Faso, Mali, Niger and Ethiopia resulted in new heights of intra-African population displacement, with over 3 million refugees and Internally Displaced Persons (IDPs) registered in the Sahel region, and 4.2 million IDPs registered in the Horn of Africa. While unlikely to translate in large-scale flows of asylum seekers outside of Africa, the enduring insecurity in the wider neighborhood might put additional migratory pressure on North African countries.

7. Artificial Intelligence as a potential disruptor with wider implications

In December 2022, with the public launch of ChatGPT, Artificial Intelligence (AI) gained widespread attention, inciting experts to consider the implications and ramifications new tools and technologies could have in a range of sectors.

Although the impact of the onset of AI is not expected to revolutionise industries suddenly, adaptation of labour markets may influence the way high-skilled and low-skilled labour mobility is carried out within the region and beyond. AI can also impact the way migrants organise both regular and irregular journeys, currently done through extensive use of social media and information on the world wide web. AI could increase spreading of disinformation but also conversely enhance the potential for analysing and understanding communication within and among migrant communities. Furthermore, the potential uses of these technologies and tools in the migration governance sector may be worth further attention, as the rapid evolution of these technologies inevitably permeates the lives of citizens across the globe.

Introduction

2022 was an unprecedented year in the field of migration. The Russian invasion of Ukraine has disrupted the existing global order and generated the largest refugee crisis in Europe since the end of the Second World War. Beyond that, the consequences of the war in Ukraine have aggravated the already existing security threats and political instability, as well as sustained economic stagnation due to the COVID-19 pandemic in the region.

With the devastating effects of the earthquakes that struck southern Türkiye and northern Syria on 6 February, 2023 sets out to be another challenging year, particularly for the most vulnerable populations in the region.

Affected by multi-faceted socio-economic, environmental and security challenges and exposed to the fallouts of several armed conflicts occurring in neighbouring regions, countries in **North Africa** play a crucial and complex role in migration dynamics in the Mediterranean. In addition to their impact as countries of destination of migrants, they are also countries of origin, transit and of secondary movements of people *en route* towards Europe. Their geographic proximity to Europe has naturally attracted migration cooperation efforts from the EU and its Member States focussed primarily (but not exclusively) on combating irregular migration.

Countries in the **Middle East** host one of the largest concentrations of forcibly displaced people in the world originating from various humanitarian crises that occurred over the last decades. Such a mass influx of refugee populations has significantly impacted the socio-economic stability of host countries both in terms of overburdened infrastructure and serious threats to regional security and economic stability. Host countries have been facing a double challenge: on the one hand, exercising primary responsibility under international law to address the immediate needs of refugees; on the other hand, fostering socio-economic opportunities and growth while mitigating the long-term difficulties associated with large-scale protracted forced displacement.

The different political and socio-economic contexts result in diverging migration priorities, which are often ascribed with lower importance when compared to socio-economic and security concerns. This inevitably influences cooperation on migration, compelling migration actors to carefully consider the interests, competencies and capacities of all partners.

This publication provides a regional perspective to ICMPD's Migration Outlook 2023, delving into key current and emerging migration trends in the Mediterranean region, with a focus on North Africa and the 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

Morocco

During the past year, Morocco strengthened its central role in governing migration flows to Europe by entering and implementing border management and anti-smuggling partnerships with the EU and Spain. Such agreements proved to be fruitful, with annual numbers of detected illegal crossings in 2022 dropping by 21% in the Western Mediterranean route and by 31% in the and Atlantic route.

Nonetheless, the complex situation at Moroccan borders made headlines in June last year, when dozens of migrants, mostly from Sudan and South-Sudan, lost their lives while attempting to enter Melilla. The escalation of tensions related to Polisario Front's claim for independence further heightened the risk of instability and larger migration flows across the Mediterranean.

Morocco is also increasingly hosting asylum seekers and refugees, whereby the refugee population in Morocco has nearly doubled since 2019, while the overall number of asylum seekers has tripled. According to late 2022 figures, a total of approximately 19,000 persons were registered as asylum seekers or refugees in the country. In addition, Morocco's relatively stable economic outlook made the country increasingly attractive as a destination for migrant workers, particularly those of Sub-Saharan origin.

At the same time, Morocco continues be also a country of emigration. Moroccan nationals remained among the top three nationalities of foreigners residing in Spain, France and Italy, while the number of Moroccan asylum seekers registered in Europe has seen a rise in recent years, albeit with relatively small asylum application success rates. High levels of youth unemployment (27% according to latest ILO figures) coupled with last year's severe droughts, suggest that Morocco will continue to be exposed to migratory pressures, highlighting it as a key player in the Mediterranean cooperation landscape.

Tunisia

In 2022, Tunisia was marked by intense political and socio-economic challenges.

The COVID-19 pandemic that impacted the tourism industry, one of the motors of Tunisia's economy, and the fallout of the Ukraine conflict, further worsened Tunisia's overall economic outlook. Throughout the year, the ban on exports from Ukraine resulted in an increase in food, fuel and natural gas prices, and a shortage of basic necessities, such as water, sugar, and wheat products. In parallel, the government reached a preliminary agreement for a loan from the International Monetary Fund to manage its budget deficit.

Inflation rates in Tunisia reached 9.8% as of November 2022, the highest measured since 1984, and unemployment rates continued to rise. In addition, the lack of rainfall significantly impacted agricultural production, threatening livelihoods in rural areas and further contributing to an increase in food prices.

Meanwhile, Tunisia undertook substantial institutional reforms. One year after the dissolution of Tunisia's parliament by presidential decree, a new constitution was adopted granting increased powers to the presidential function. A new electoral law was enacted, paving the way for the first round of parliamentary elections that were held on 17 December 2022 and saw a voter turnout of 11.2%.

This set of socio-economic, environmental and political challenges could have been the driving factors of last year's over 10% growth in the number of Tunisian nationals arriving to Italy, with Tunisians representing the second largest nationality of migrants in the Central Mediterranean Route (as of November 2022). In addition, a spike in attempted border crossings by Tunisians in the Western Balkan Route (5,777 detections last year, compared to 842 in 2021), triggered Serbia to suspend the visa-free regime. The increased engagement of Tunisian institutions in addressing these challenges is, amongst others, reflected by the increased number of operations and interceptions carried out by the *Garde Nationale Maritime (GNM)*, which reported an increase to 2145 operations in 2022, compared to 1489 operations in 2021.

As the above-mentioned challenges are unlikely to abate any time soon, it is foreseen that Tunisia will remain a point of interest for regional migration in 2023.

Food security and migration in Tunisia
An ICMPD trend assessment study addressed the interlink between food security and migration in Tunisia, compounded by the recent war in Ukraine, and migration in the region.

Among the main findings is the changing profile of migrants, as already identified through the Households International Migration Surveys (HIMS). In addition to irregular flows, many **Tunisian families are choosing to emigrate to offer better opportunities for their children.** Notably, many Tunisian **high-skilled workers, engineers and medical professionals are capitalising on opportunities abroad** to pursue their futures elsewhere. Expert interviews showed that in these instances, food insecurity was only a catalyst to decisions that mostly accounted for a lack of political stability and a worsening economy.

Sub-Saharan migrants in Tunisia are disproportionately affected by food shortages and the worsening economic situation in the country. Given their existing vulnerabilities and often limited resources, many reported that the increase in fuel prices limited their mobility in cities and their pursuit of short-term professional opportunities. Many sub-Saharan migrants also reported their continued desire to migrate towards Europe, despite the inflation and potential increase in energy prices, because of their perceptions of better opportunities in job markets and access to state support in Europe in comparison to Tunisia. This is further evidence of the comparative advantage of some countries of destination over others, and the perceived benefits migrants can receive such as higher salaries and social benefits, even if these countries come with higher costs of living.

From a food security perspective, Tunisia's vulnerability to external shocks and food price volatility requires important and potentially unpopular food, agriculture and energy policy reforms that would affect existing subsidies. The government's monopoly on some food imports, the need to provide incentives to local farmers, and restructuring of food and fuel subsidies, were cited as important and urgent aspects to address.

Libya

In 2022, Libya continued to face a difficult post-conflict stabilisation process and a highly complex migration situation.

As of November 2022, the population of foreigners in the country included an estimate of 680,000 labour migrants (mainly from Niger, Egypt, Sudan, Chad and Nigeria), 43,000 registered refugees and asylum seekers, 143,000 Internally Displaced Persons (IDPs), and 4,500 persons held in detention. Whilst the number of IDPs have continued to decrease, likely due to the improved levels of security in the territory, the number of migrants in Libya gradually grew and surpassed pre-pandemic levels.

Whilst the humanitarian situation in the country improved, 522,806 people remain affected by the protracted political crisis, insecurity, and economic hardship, while just under 330,000 people are believed to be in need of humanitarian assistance. At the same time, reports of attacks and assaults on migrant populations are frequent.

As of August 2022, a slight increase in sea departures from Libya was recorded in the **Central Mediterranean Route** (52% of sea arrivals in Italy embarked in Libya compared to 46% in 2021). With regard to the nationalities of migrants transiting Libya towards the EU, in 2022 the main countries of origin of migrants detected along the Central Mediterranean Route − including Tunisia as a point of departure – were Egypt (19%), Tunisia (19%), Bangladesh (14%), Syria (7%) and Afghanistan (7%). This reaffirms a previously observed trend of shift of origin of migrants along this route from sub-Saharan to North African and Asian.

Since the revolution in 2011, Libya has faced continuous political fragmentation and instability. Despite the establishment of the interim Government of National Unity in 2021 (with the aim to steer Libya towards general elections), the legislative and presidential elections scheduled for 24 December 2021 were postponed indefinitely, as a parliamentary committee tasked with overseeing the electoral process could not agree on the electoral process. Whilst the ceasefire held throughout 2022 resulted in progress in the area of security, enduring disagreements between the two rival governments still pose a risk to stability.

The described precarious political and security situation might affect the capacity of irregular migration flows to, through and from the country. This notwithstanding, should the political situation improve, a need for additional foreign labour force in particular sectors, notably health and construction, may arise.

The aftermath of the COVID-19 pandemic and the global economic and food crisis are likely to exacerbate pre-existing challenges, which may have an impact on migration from and through Libya that is likely to see a continued increase in line with trends of the last two years.

Due to its current and foreseeable demographics and sectoral needs, migration, in all its diversity, is and will remain an important issue for the country, both in terms of domestic agenda as well as international cooperation, and so will the need to continue gradually progressing towards sound migration governance.

Egypt

According to IOM estimates, Egypt hosts over 9 million foreign nationals, accounting for approximately 9% of the country's total population.

2022 saw a steep increase in the recorded number of Egyptian irregular migrants, with Egypt becoming the top country of origin of migrants arriving in Italy irregularly through the Central Mediterranean Route, and the second largest migrant population in Libya. Similar to other countries in the region, these trends are likely due to the severe economic stagnation that has affected Egypt as a result of the repercussions of the Ukraine armed conflict, causing currency depreciation and price inflation. Egypt’s pound has devaluated and, in January 2023 reached a record low. The government has agreed on a $3bn loan from the IMF.

The challenging economic landscape is further confounded by widespread water scarcity that could have a significant impact on the livelihoods of agricultural workers in the Nile Basin. According to the Egyptian government, this situation has already resulted in social problems and in a surge in irregular migration.

The Greek and Egyptian Governments signed an agricultural deal last year to allow 5,000 seasonal farm workers from Egypt to be employed in Greece for up to nine months.

Given its prominent role as a host country of a large and mixed migrant populations as well as emigration of labour migrants and with the current economic hurdles faced, Egypt is likely to attract the attention of cooperation efforts in the region on a range of relevant migration issues.

Lebanon

Lebanon is facing a multi-layered crisis with grave and progressively evident humanitarian concerns. Over 74% of the country's population is living in poverty, including 90% of the approximately 1.5 million Syrian refugees hosted in the country. Despite an absence of government since the May elections, President Michel Aoun announced in October 2022 that Lebanon would soon begin returning Syrian refugees to their home country. There has been an increase of irregular boat departures from Lebanon to Cyprus and Italy, with the latter replacing the former as the desired country of destination. Costs for this journey are relatively high, averaging 5,000 USD per passenger. The departures include secondary movements due to dire economic situation and threat of deportation including, but not limited to, Syrians who leave due to inflation and the economic crisis, who use Lebanon as a transit destination towards Europe.

Despite a potentially lower relative importance in terms of volume of arrivals via the Eastern Mediterranean, compared to other migration routes, the country's particularly fragile situation and its disproportionate impact on vulnerable populations, including refugees, are worth close monitoring in the coming year.

Sahel and Horn of Africa

In recent years, both the Sahel and Horn of Africa regions experienced widespread conflicts and insecurity. In the Horn of Africa, the armed conflict involving the Ethiopian and Eritrean governments and the Tigray People's Liberation Front resulted in an estimated 500,000 deaths and 20 million people in need of humanitarian assistance. In the Sahel, insecurity is largely driven by the *coup d'état* in Burkina Faso and by *jihadist* insurgencies in Mali and Niger. All these situations combined produced new heights of forced displacements, reaching over 2.9 million refugees and Internally Displaced Persons (IDPs) in the Sahel, and 4.2 million IDPs in Ethiopia alone.

The effects of climate change, food insecurity and lack of socio-economic opportunities further aggravated the overall situation of the two regions. The dispute between Egypt and Ethiopia over the use and management of the Nile River over the construction of the Grand Ethiopian Renaissance Dam (GERD) on the Blue Nile persists. The conflict could result in water shortages in Egypt and Sudan, as well as potential for political and economic instability in the region. Efforts to resolve the conflict through negotiations have been ongoing, but a resolution has yet to be reached.

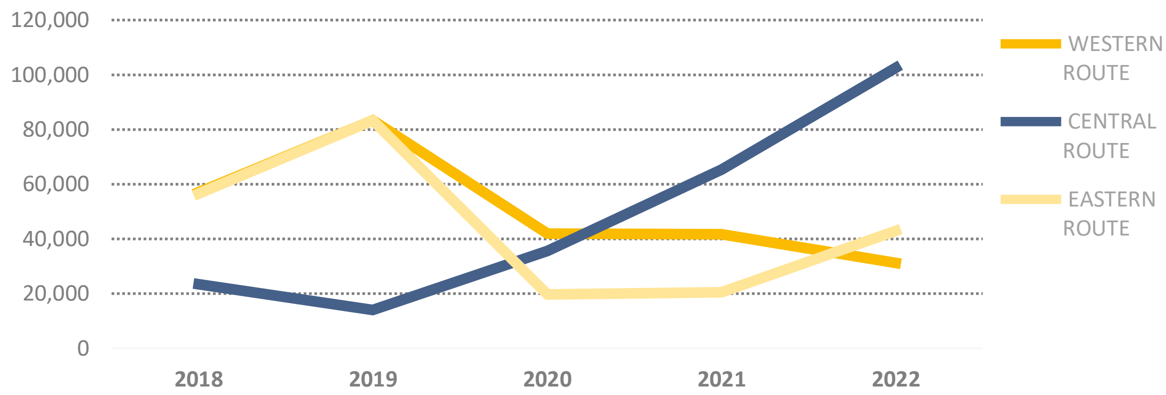
In 2022, 25,579 refugees from East Africa were registered in Libya, representing a more than two-fold increase compared to 2021. Even though such numbers are relatively low, the magnitude of the ongoing humanitarian crises and the proximity of the Sahel and Horn of Africa regions to Southern Mediterranean countries require policy actors to closely monitor factors driving migration in the imminent future.

Migration trends in the region

Irregular migration

In 2022, over 175,000 migrants reached Europe across the Mediterranean irregularly, travelling largely by sea through the Central and Eastern Mediterranean routes, mainly from Libya/Tunisia to Italy, and from Türkiye to Greece respectively (see Figure 1 below). These figures show that there was roughly a 20% increase from the number of irregular arrivals registered in 2021, continuing an upward trend which started with the easing of COVID-19 related restrictions in 2020. **A sharp surge in illegal crossings is observed particularly in the Central Mediterranean**, as seen below. This consolidated a trend that began in 2020, where irregular maritime migrants gradually shifted from Western[2] and Eastern Mediterranean routes in favour of the Central Mediterranean Route, although the Eastern Route saw a resurgence again in 2022 – yet still far below pre-pandemic levels. The reason for the shift is likely to be the stringent border control policies adopted by Morocco in the Western route, and by Türkiye and Greece throughout the Eastern route.

Figure 1: Irregular arrivals in the EU - Mediterranean Routes (2017–2021)



Source: Council of the European Union

Regarding the number of irregular departures from countries in North Africa, and how these compare to the previous year, from Algeria these remained steady (around 13,000), were approximately halved from Morocco (from 41,126 in 2021 to 22,900 in 2022), and increased substantially both from Tunisia (from 35,598 in 2021 to 50,351 in 2022) and Libya (from 63,956 in 2021 to 70,695 in 2022). Interceptions and returns to North Africa experienced an overall decrease from 67,358 in 2021 to 53,641 in 2022, with Tunisia being the only country against the trend with an increase of 25% compared to the previous year.

An estimated number of 2,023 people lost their lives or were reported missing while traversing the Mediterranean Sea to reach Europe in 2022, reflecting a slight decrease from 2021.

[2] The Western Mediterranean route refers to irregular arrivals via the Mediterranean Sea to mainland Spain, and by land to Ceuta and Melilla in Northern Africa.

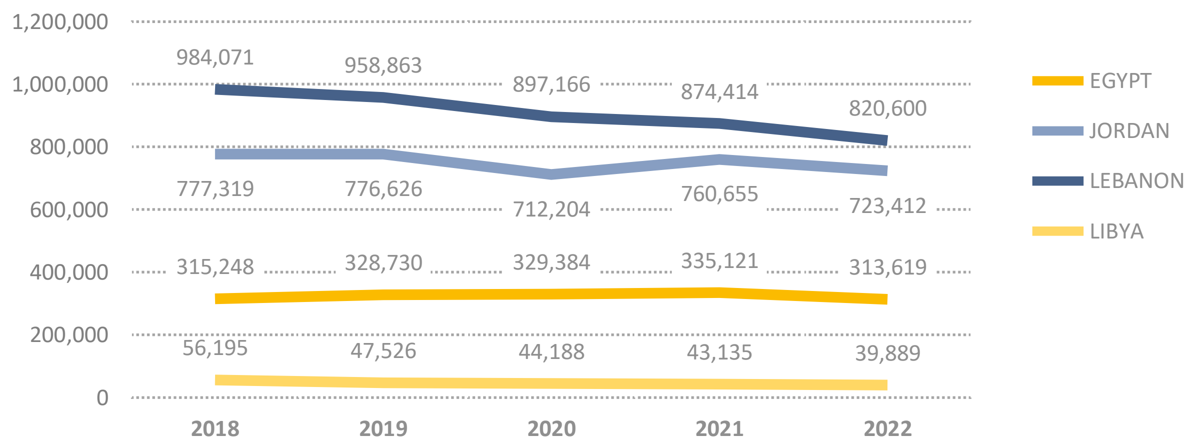
Consistent with previous years' statistics, 72% of irregular maritime migrants were men, and a fifth of all registered migrants were children, while the four most represented countries of origin of irregular migrants apprehended in the Mediterranean Sea were: Tunisia (33,118), Egypt (28,871), Bangladesh (22,105) and Syria (13,894). While this trend is largely consistent with the data recorded in the past two years, a notable shift occurred with regards to Algerian and Syrian nationals. Algerians went from being the third most represented group in 2021, to being out of the top 10 most represented nationalities of irregular migrants in 2022. While the cause of this decrease is uncertain, a possible explanation might be the extensive means and efforts that Algerian authorities have adopted in reinforcing border security, tackling migrant smuggling and operating migrants' returns. Conversely, the number of Syrian migrants using Mediterranean routes more than quadrupled from 2021. This might partly be the result of secondary movements from Lebanon, Türkiye or direct departures from Syria due to worsening of local situation.

Refugees and asylum seekers' influx

The Mediterranean continues to host one of the largest concentrations of refugee populations in the world. The size of the refugee population has remained particularly high in the Middle East, with UNHCR estimating the number of refugees/asylum seekers in Jordan and Lebanon to be over 723,000 and 820,000 respectively (see Figure 2 below). This signals a slight decrease from the data recorded for Jordan last year, and confirms a downward trend for Lebanon with a reduction of almost 20% since 2017. This change is likely due to the deterioration of the economic situation in Lebanon and announced plan of the Lebanese Government to commence operating returns of Syrian refugees, which might have triggered secondary movements of refugees and asylum seekers to neighbouring countries and beyond.

A drop is also notable in Egypt, where refugees and asylum seekers decreased from 335,121 to 313,619 in the 2021-2022 period.

Figure 2: Refugees and Asylum Seekers (2017-2021)



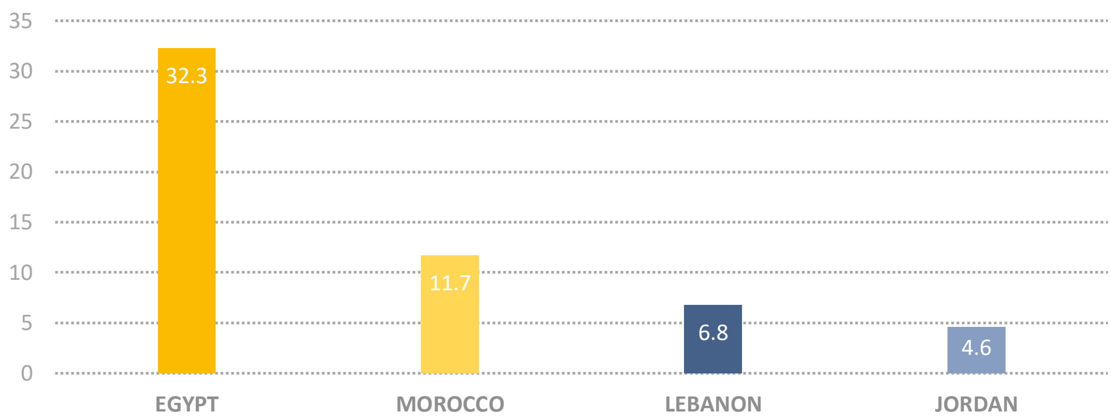
Source: UNHCR

Syrian refugees are largely prevalent throughout the region. Nonetheless, the influx of Syrian refugees to neighbouring countries in the region has stabilised, with the number of recorded Syrian refugees for 2022 compatible with the figures of 2018. However, official numbers may not illustrate the full picture whereby trends signal towards continued departures from Syria, via Lebanon, towards other destinations. Refugee returns to Syria have increased in the last few years but still remained comparatively low, with around 3,000 Syrians opting for voluntary repatriation in 2022. The total number of resettlement submissions from Jordan and Lebanon slightly increased from last year, reaching a total of 15,000.

Remittances

Remittances to countries in the Middle East and North Africa region are projected to have grown by an estimated 10.5% in 2022. Specifically, a strong increase was recorded in inflows to Morocco (by around 20% to $11.7 billion) and to Jordan (by around 12% to $4.6 billion), likely driven by economic growth in host countries of remittance senders in the EU, and a recovery in agricultural output in Morocco which underpinned consumer confidence. Egypt – with ties to Egyptians living in countries of the Gulf Cooperation Council (GCC) – remained the top recipient of remittances in the region (see Figure 3 below) despite a recorded slight decrease (of around 3% to $32.3 billion) likely caused by erosion of real wages among the Egyptian migrant workforce in Europe and the United States.

Figure 3: 2021 top remittance recipients ($ million)



Source: KNOMAD

In 2022, remittances continued to account for a substantial portion of the GDP of several countries in the region, particularly in Lebanon (37.8%), Palestine[3] (18.6%) and Jordan (9.7%) where remittance dependency increased by roughly 3%, 2% and 1.5% respectively. **Remittances were of crucial importance to counterbalancing the fallouts from the Ukraine war and increased food and energy prices across the region.** Finally, the cost of remittances in the region decreased from 6.6% to 6.4% in the fourth quarter of 2021, representing the largest decline in costs among developing regions.

[3] This designation shall not be construed as recognition of a State of Palestine and is without prejudice to the individual position of the ICMPD and the EU Member States on this issue.

Expected migration trends for 2023

In 2023, the drivers of mobility related to socio-economic struggles, conflicts, and environmental risks will probably continue to have an impact on mobility in the region, although there is uncertainty about how they will develop. Mixed irregular migration flows are likely to continue at a similar level to those registered in 2022.

UNHCR's latest return intention survey (conducted in March 2022) indicates that while most Syrians wish to return one day (58%), only a small number plan to do so within the following year (1.7%).

Nonetheless, the severe impact of the Ukraine war on food and energy prices on both sides of the Mediterranean, coupled with the effect of climate change on water availability and agriculture, and natural disasters such as the earthquakes that struck southern Türkiye and northern Syria on 6 February 2023, might lead to an influx of asylum seekers and migrants in North African countries and on the Mediterranean routes to Europe. Political instability in the Maghreb and Sahel regions, and the enduring armed conflict in Ethiopia could further increase the number of people moving to other countries in the region and irregularly transiting to Europe. These trends are likely to slow the pace of remittances sent to host economies in the Middle East and North Africa, which is, nonetheless, predicted to experience a moderate increase due to the positive financial situation of GCC countries.

Regarding labour migration, the limited capacity of countries in North Africa and the Middle East to absorb an increasingly educated workforce might increase the likelihood of people seeking employment in countries other than their country of origin within the region or elsewhere. As several European countries reported a lack of skilled workers and labour shortages across many sectors, labour migration to Europe is expected to increase in the near future, either through the use of instruments such as the EU Talent Partnerships – introduced by the New EU Pact on Migration and Asylum − or through the conclusion of bilateral labour agreements.

Migration policy developments

The growing importance of climate change and the "green" transition

In 2022, the region became the global epicentre of policy discussions on climate change, with the 27th Conference of the Parties to the United Nations Framework Convention on Climate Change (COP 27) being hosted in Egypt. While not featuring prominently in the COP 27 agenda, the link between climate change and displacement was widely acknowledged by participating countries and several climate migration issues − including fostering climate resilience; enabling new legal migration pathways; and protection instruments for people affected by climate factors – were discussed. When considering the exposure of the region to desertification, increasing soil aridity and exhaustion of water sources, and the potential impact that these will produce on people's mobility, it is likely that the salience of climate change in regional migration policy fora will increase in the next years.

In addition, the call of the international community to speed up economic transitions to low-carbon/renewable energy – as affirmed for example in the 2030 Agenda for Sustainable Development, in the Global Pact for Safe, Orderly and Regular Migration and in the New Agenda for the Mediterranean on Migration and Mobility – will likely impact labour market needs and the workforce composition in the Mediterranean region. This should eventually lead to higher demand for migrant and local workers with specific "green" skills and qualifications. An important regional development in this area was the signing of the EU-Morocco Green Partnership on energy, climate and the environment, which aims to tackle climate change and grasp the economic opportunities inherent in the "green" transition. In this regard, the European Year of Skills 2023 will promote a mindset of reskilling and upskilling, helping people to get the right skills for quality jobs in the EU. In addition, the green and digital transitions will open new opportunities for people and the EU economy. Expanding the geographic scope to integrate migration and mobility, particularly with neighbourhood countries, might represent a solid path towards more balanced, equal and mutually beneficial partnerships.

Advancing the New Pact on Migration and Asylum

The significant increase of irregular arrivals across the Mediterranean has put renewed emphasis within the EU on the operationalisation of the New Pact, which according to the European Commission "*remains the only way to put in place a stable and sustainable framework to address migratory challenges*". An important step forward was made last year with the adoption of a 'solidarity declaration', in which Member States agreed to start negotiations with the European Parliament on two migration management tools, namely the revised Eurodac database and the screening regulation.

Nonetheless, the implementation of the New Pact has been hindered by divisions among EU Member States on the adoption of the 'Voluntary Solidarity Mechanism', designed to support Mediterranean EU Member States through relocation of asylum seekers and refugees or through financial contributions. Such divisions have been reignited by recent political changes in the region including the support of Italy's new government for increased relocation agreements, and for a crackdown on search-and-rescue operations conducted by privately owned vessels. This development, combined with upcoming elections in other southern EU countries (such as Greece and Cyprus) is likely to heighten the interest of EU migration policy makers for the Mediterranean region and further increase the salience of irregular migration in 2023.

With reference to the external dimension of the New Pact, in November 2022 the European Commission proposed the EU Action Plan for the Central Mediterranean ('the Action Plan'). The Action Plan includes 20 different measures organised across three pillars aiming at strengthening cooperation with partner countries and international organisations to curb irregular migration, facilitate returns, and open new legal migration pathways; strengthening cooperation between EU Member States and all actors involved in search-and-rescue operations in the Mediterranean; and operationalising the Voluntary Solidarity Mechanism and Joint Roadmap in furtherance of the New Pact.

The first deliverable supporting the rollout of operational actions to manage migration under the Action Plan was the launch of a ‘Team Europe Initiative’ (TEI) on the Central Mediterranean, bringing together EU and African partners. The TEI – in parallel with a similar initiative focussed on the Western Mediterranean route – aims at creating new opportunities for coordination with partner countries, international partners, and relevant UN Agencies to improve joint actions around five priority domains, namely: prevention of irregular migration and counter smuggling/trafficking; legal migration and mobility; protection; return, readmission and sustainable reintegration; and migration and development.

Consistent with the Action Plan’s objectives, the EU has also concluded important partnerships with South Partner Countries. For example, a joint EU-Egypt border protection project was launched to enhance Egypt’s border management capacity by delivering specialised training on humanitarian border management and by purchasing equipment to be deployed on land and sea search-and-rescue operations. A renewed anti-smuggling partnership was also entered between Morocco and the EU in support of border management, enhanced police cooperation, awareness-raising on the dangers of unlawful migration and enhanced cooperation with EU agencies responsible for home affairs. As envisaged in the Action Plan, cooperation agreements with other North African countries (such as Tunisia and Libya) are likely to be negotiated in the imminent future.

Finally, migration-related bilateral agreements were signed between EU Member States and North-African countries. Portugal and Morocco agreed on a labour migration framework allowing the recruitment, hiring and admission of Moroccan citizens in Portugal with equal rights and duties to Portuguese workers. Furthermore, the Greek and Egyptian Governments signed an agricultural deal allowing up to 5,000 seasonal farm workers from Egypt to be employed in Greece for a maximum of nine months. In addition, Spain and Morocco deepened their cooperation in migration and the fight against crime by agreeing to exchange information and expertise on organised crime and technology, including providing technical assistance in operational investigative activities related to trafficking in human beings and smuggling.

Impact of perceptions of migration on cooperation

Beyond the devastating socio-economic effects in the region, the armed conflict in Ukraine also had an impact on the perception of migration and displacement in Europe and beyond. Polls conducted last year suggested that public openness increased in Europe to people fleeing war or oppression, with many people taking personal action to support escapees from Ukraine. While this operated to ensure the political consensus that governments of EU Member States needed to enact effective policy responses to the Ukrainian crisis, several commentators highlighted the absence of comparable levels of European solidarity to other displacement situations. Further research is needed to evidence the characteristics of potential shifts and discrepancies in public attitudes to migration. Nonetheless, the perceived existence of a ‘double standard’, when it comes to shaping migration narratives and policies, could affect North-South cooperation efforts in the region.

Conclusions for 2023

The 2023 Euro-Mediterranean migration landscape will probably be shaped by the complex interaction of the set of socio-economic, political, security and environmental challenges that were briefly presented in this paper, including repercussions of unexpected events such as the earthquakes that shook Türkiye and Syria in February.

Whilst strategically paramount to the EU's external dimension, migration remains a lower priority issue for countries in the Middle East and North Africa, compared to security, economic and social concerns. The fallouts of the Ukraine conflict might consolidate this trend by bringing additional economic woes South of the Mediterranean, and increasing the size of the displaced population in the North. Furthermore, when it is salient, migration is often treated by South Mediterranean countries in the prism of a potential driver for opportunities related to investment, growth and social mobility.

Armed conflicts in Africa and the Middle East will continue to threaten the stability of the region, and to put additional strain on the outstretched resources of countries that are hosting a large number of refugees. Accordingly, this year's policy discussions are likely to revolve around the notion of 'responsibility-sharing', inherent in the spirit of mutually beneficial partnerships, and on how to help host countries bear the burden of refugee protection and alleviate endemic problems such as unemployment and food/water scarcity.

The exposure of the Mediterranean region to desertification, extreme weather events, increasing soil aridity and exhaustion of water sources is likely to incentivise people to use migration as an adaptation strategy. Nonetheless, climate change will also bring new opportunities. Based on current forecasts in line with countries' climate plans, the world will need at least 20 million additional workers in climate-sensitive sectors by 2030, with most countries recognising that they do not have the human capital to achieve a low-carbon/'green' transition. This could lead countries in the region to adopt policies to enable the circulation of 'green' skills and to attract and retain highly skilled but also medium-to-low-skilled migrants in climate-sensitive sectors, such as agriculture and construction.

The size and complexity of the outlined multi-faceted factors that might drive people's mobility in 2023 will almost certainly reduce the efficacy of compartmentalised cooperation agreements focused on short-term gains. Migration partnerships are more likely to succeed if they adopt long-term visions that link a wide range of public policies, based on mutual trust, shared values and conducive communication and that contextualise short-term sacrifices, endured by both parties, in the framework of a wider strategy for future success.

Sources

American Security Project (2012) The Arab Spring and World Food Prices**, November 2012. Accessed 23.01.23.**

Anita Kappeli, Adam Jennison and Daniele Fattibene (2022), Italy's Move to the Right and the Implications for Global Development**, Centre for Global Development Accessed 23.01.23**

Armed Conflict Location & Event Data Project (2022) 10 Conflicts to Worry about in 2022**. Accessed 5.01.2023**

Autorité de Développement Intégré de la Région du Liptako-Gourma (ALG) & World Food Programme (WFP) (2020) Conflits Persistants, Pertes de Terres Agricoles et Insécurité Alimentaire Récurrente dans la Région du Liptako-Gourma**. July 2020. Accessed 23.01.23.**

Bar-Yam, Y., Bertrand, K.Z., Lagi, M. (2011) The Food Crises and Political Instability in North Africa**. Accessed 23.01.23.**

Bellemare, M.F. (2012) Rising Food Prices, Food Price Volatility, and Political Unrest. University of Minnesota

Delina Goxho (2022), Militarizing the Sahel won't make Europe more secure**, Foreign Policy. Accessed 23.01.23**

Emirates Policy Center (2022) Russia-Ukraine War and the De-escalation in Libya. 20 April 2022**. Accessed 5.01.2023**

Euronews (2022) UN report: Libya faces serious security threat from foreign fighters, Russia's Wagner**. 28 May 2022. Accessed 05.01.2023**

Euronews (2022), Brussels sets out action plan to tackle irregular arrivals via Central Mediterranean**, Brussels. Accessed on 23.01.23**

European Commission (2020) New Pact on Migration and Asylum**. Accessed 23.01.23**

European Commission (2022) EU Action Plan for the Central Mediterranean**. Accessed 15.12.22**

European Commission (2022), Joint press release: Strengthening cooperation in the fight against migrant smuggling: the European Union and Niger launch operational partnership to tackle migrant smuggling**. Accessed 15.12.22**

European Council for Foreign Relations, The moment to choose: How migration politics could damage Meloni government's EU credentials**. Accessed 23.01.23**

European Parliament (2021), New EU strategic priorities for the Sahel Addressing regional challenges through better governance**". Accessed 15.12.22**

Politico (2022), Italy's president tries to calm Meloni's fight with Macron over migrants**, Politico. Accessed on 23.01.23**

Hertig, E., Schilling, J., Tramblay, Y., et al. (2020) Climate change vulnerability, water resources and social implications in North Africa**, Regional Environmental Change 20. Accessed 23.01.22.**

ICMPD (2022) Could disruptions to Eastern European wheat spur displacement in Africa?**, Commentary, 10 May 2022. Accessed 23.01.23**

ICMPD (2022) ICMPD Migration Outlook Mediterranean 2022: Six migration issues to look out for in 2022 **, February 2022. Accessed 23.01.23**

ICMPD (2022) Rural Communities and Migration: An Assessment of Migration Factors in the South Mediterranean**, November 2022. Accessed 23.01.23**

ICMPD (2023) ICMPD Migration Outlook 2023: Ten migration issues to look out for in 2023. January 2023

Intergovernmental Panel on Climate Change (2022) Climate Change 2022: Impacts, Adaptation and Vulnerability**. Contribution of Working Group II to the Sixth Assessment Report of the Intergovernmental Panel on Climate Change. Cambridge University Press. Accessed 23.01.23**

International Labour Organization, United Nations Environment Program (2022), Decent Work in Nature-based Solutions 2022**", 2022.Accessed 23.01.23.**

International Crisis Group (2023) 10 Conflicts to Watch in 2023**. 01 January 2023. Accessed 5.01.23**

Istituto Affari Internazionali (2022), The EU's Diplomatic Engagement in the Sahel**. Accessed 15.12.22**

KNOMAD (2022), Migration Brief 37, Remittances Brave Global Headwinds. Special Focus: Climate Migration**. Accessed on 23.01.23.**

Middle East Institute (2022) How has the Ukraine war affected Russia's ties with Libya and Sudan? **25 April 2022. Accessed 5.01.2023**

Mixed Migration Centre (2022) Climate mobility in the Khartoum Process countries: an exploration of interventions**, MMC Briefing Paper. Accessed 23.01.23**

Moreno-Dodson, B., Gasmi, I., Gourraud, C. and Tsakas, C. (2022) The Water Security Nexus in North Africa: Catalyzing Regional Coordination Around Climate Change, Resilience and Migration**. Marseille: Center for Mediterranean Integration and UNOPS. Accessed on 23.01.23**

Observatory of Economic Complexity (2023) Wheat: Historical Data**. Accessed 4.01.23**

The Arab Gulf States Institute in Washington (2022) Libya Backslides as Two Governments Vie for Power, Again**. 28 February 2022. Accessed 5.01.23**

UNHCR (2022) Jordan Factsheet**, October 2022. Accessed 17.01.23**

UNHCR (2022) Lebanon Factsheet**, October 2022, Accessed 17.01.23**

UNHCR (2023) Operational Data Portal: Mediterranean Situation **Accessed 5.01.23**

UNHCR (2023) Sahel Situation: 2023 situation overview**. Accessed 5.01.23**

United Nations (2022) One Year after Failing to Hold Elections, Libya's Situation Deteriorating, Special Representative Warns Security Council, Calling for Action Towards Electoral Track**. 16 December 2022. Accessed 5.01.23**