ICMPD
International Centre for
Migration Policy Development

ICMPD Migration Outlook Mediterranean 2024

Eight migration issues to look out for in 2024

Origins, key events and priorities for Europe

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The 8 things to look out for in 2024

1. The upward trend of migratory pressure

Confirming the trend of previous years, 2023 has witnessed a significant surge in irregular crossings on all main migratory routes across the Mediterranean: maritime arrivals to Europe reached the highest levels since 2016,[1] and the number of people reported missing or dead surpassed 4,000, making the Mediterranean routes the deadliest on record. While countries in the region have reacted by adopting strict migration policies and topping-up existing partnerships on border governance, the general increase might signify that the ability of border management systems to limit irregular flows is reaching certain limits vis a vis the intensification of migratory push factors, particularly in Africa. Should this assumption be correct, irregular migration flows are likely to either remain stable or continue to grow in 2024. The ability of cooperation efforts to tackle the causes, as opposed to mainly the symptoms, of irregular migration will be an important factor to consider in upcoming migration policy scenarios.

2. New waves of refugees from Sudan

Since fighting first broke out in Sudan between the Sudanese Armed Forces and paramilitary Rapid Support Forces on 15 April 2023, the number of people displaced by the conflict in Sudan has surpassed 8 million, including around 1.1 million persons who have sought refuge in neighbouring countries – with an estimate of 460,000 in Egypt alone. As the humanitarian crisis in Sudan is expected to deteriorate through 2024, the number of asylum seekers from Sudan is likely to continue growing. Finding solutions to the conflict whilst reducing tensions between the local and the refugee population in host countries will probably be highly debated topics this year.

3. The securitisation of migration narratives and policies

Return policies geared at irregular migrants, accompanied by narratives which portray foreigners as a security issue for host communities – linked to crimes, socio-cultural clashes and competition for jobs and limited resources – appeared to be on the rise throughout the region. These largely mirror the salience of border governance externalisation on EU's political debates and people's dissatisfaction with the complex economic situation and prolonged migratory pressure experienced by many countries in the Middle East and North Africa. These narratives and related policies will presumably continue in 2024, potentially prompting secondary movements of migrants seeking better conditions elsewhere.

[1] See below the 'Migration Trends in the Region' section.

4. Shockwaves from Gaza

The recent escalation of the Israel-Hamas armed conflict has generated a very serious humanitarian situation and left the population of the Gaza Strip in dire straits. At the end of 2023, 1.9 million people were internally displaced and over 90% of the population faced acute food insecurity and were cut off from access to basic goods and services, including medical aid. It is widely considered unlikely that the residents of Gaza will actually be displaced outside the Strip due to their reported unwillingness to relocate and due to the serious concerns of neighbouring countries related to a possible displacement of a large number of Palestinians. Nonetheless, the fallout of the conflict is likely to continue affecting the general stability and economic prospects of neighbouring countries, by reducing trade and tourism and negatively impacting consumer and business confidence. All these factors might play an important role in shaping aspirations for mobility in the region in 2024.

5. The polycrisis wears on

Still recovering from the impact of COVID-19 and largely affected by the war in Ukraine, the international community has again faced a situation of multiple global crises last year. Long-lasting and newly emerged armed conflicts, coupled with the effect of climate change on water availability and agriculture, are likely to exacerbate the fiscal pressures, slow growth and steep unemployment experienced by countries in the region, and to push additional populations into poverty. The compounding impact of the above-mentioned factors is likely to increase the number of people in the region who, in the upcoming years, will consider internal mobility or migration as a viable option to increase their safety and economic outlook.

6. The operationalisation of partnerships

In 2023, several agreements involving the EU, EU Member States and Southern Partner Countries were either concluded or negotiated. These include proposed comprehensive partnerships between the EU and Tunisia/Egypt linking interventions in the field of anti-smuggling and border control with other public policy areas such as macro-economic stability, food, water, security and energy.[2] Such deals were accompanied by controversies related to the perceived human rights risk of a further externalisation of migration management, and a political stalemate on the amount of financial contributions by the EU and the targeted areas of intervention. As it remains to be seen how these deals will be implemented in practice, the ability of the involved countries and institutions in translating the envisaged packages in mutually beneficial actions capable of tackling irregular migration whilst addressing the structural drivers of people's movements will be important elements in the evolution of regional migration trends and policies in the imminent future.

[2] See below the 'Migration Policy Development' section.

7. The overlooked potential of labour migration from the region

Given prevalent labour shortages in Europe, continued efforts are expected by countries to build and reinforce institutional frameworks to support employment of foreign workers and active recruitment in countries of origin. Despite the prevalence of young and increasingly skilled workforce of countries in North Africa and the Middle East, Latin America and South-East Asia may be prioritised over the immediate Southern neighbourhood to meet growing demands and navigate obstacles of skills mismatch.

As such, with the current complexity and fragmentation of the relevant EU labour mobility framework, and the slow recovery of Gulf Cooperation Countries (GCC) – an important destination of intra-regional labour corridors – from the effect of the pandemic and of plummeting oil prices any significant increase in the level of labour mobility within and from the region to Europe seems rather unlikely in 2024.

8. The modernisation of migration governance

The high-speed progress of machine learning digital solutions is predicted to deeply impact regional migration governance systems in the upcoming years. Whilst technological advances have the potential to enhance preventive responses to, and an effective management of, migration related phenomena, an unequal access to new technologies might widen the capacity gap between the governments of countries in the region and undermine the level playing field for mutually beneficial partnerships. Accordingly, fostering a shared growth of technological capacity is likely to be an important element to consider in future regional cooperation efforts.

Introduction

This publication provides a regional perspective to ICMPD's Migration Outlook 2024, delving into key current and emerging migration trends in the Mediterranean region, with a focus on North Africa and the Middle East.

In recent years, the regional migration outlook has been shaped by an increasingly quick succession of related crises resulting in a permanent state of risk and insecurity that has been described as a state of 'polycrisis'. In 2022, while the region was still grappling with the long-term effects of the COVID pandemic on people's mobility and societies, the Ukraine war stroke and sent shockwaves through the regional geopolitical landscape. In addition to millions of people being forced to leave their country, the fallouts of the armed conflict contributed to food insecurity, inflation, energy scarcity and further economic detriments that put additional strain on the already outstretched resources of many Euro-Mediterranean countries. 2023 brought several reminders of the region's exposure to extreme natural events, with the earthquake that struck Morocco in September and the unprecedented floods in Libya. The endemic risks of desertification, soil aridity and exhaustion of water resources coupled with the escalation of the armed conflict in Sudan and, most recently, in Gaza continue the polycrisis trend with unpredictable and potentially serious consequences for the stability of the region in the imminent future.

Affected by such multi-faceted socio-economic, environmental and security challenges, countries in **North Africa** play a crucial and complex role in migration dynamics in the Mediterranean. In addition to their growing significance as countries of destination of South-South migration patterns, they are also countries of origin, transit and of secondary movements of people in the route of mixed migration flows towards Europe. Their geographic proximity and paramount importance of the region to Europe's external dimension of migration continues to attract increased cooperation efforts of the EU and its Member States focused primarily - but not exclusively - on combating irregular migration. The call for revitalised migration partnerships, contained in the New EU Agenda for the Mediterranean,[3] has incentivised governments of EU Member State to link their migration cooperation efforts to a wide variety of public policy areas such as macro-economic investments, water management and energy security.

Countries in the **Middle East** host one of the largest concentration of forcibly displaced people in the world that originates from currently unfolding and past humanitarian crises. Such significant presence

[3] (2021) European Commission, High Representative of the Union for Foreign Affairs and Security Policy, 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' (the New Agenda) https://eeas.europa.eu/sites/default/files/joint_communication_renewed_partnership_southern_neighbourhood.pdf [accessed on 26 July 2021], p. 17

of refugee populations continues to impact the socio-economic stability of host countries both in terms of overburdened infrastructure and serious concerns over regional security and economic stability.

The different political and socio-economic contexts result in diverging migration priorities, variable socio-economic opportunities and diverse needs in terms of the capacity for migration governance across Mediterranean countries. This inevitably impacts cooperation processes in the region, inviting migration actors to carefully consider the interests, competences and capacities of all partners, and to devise ways to develop them in practice.

Focus regions

Algeria, Egypt, Morocco and Tunisia

In 2023, the trend of increasing crossings continued along the main migration routes that link the Middle East and North Africa to Europe[4]. What changed, however, was the composition of irregular arrivals in terms of main nationalities. Irregular crossings involving nationals from North African countries decreased significantly. Detected arrivals of Algerian nationals along the Central Mediterranean Route decreased by 50.9%, of Moroccan nationals by 48.9%, of Egyptian nationals by 45.1% and of Tunisian nationals by 13.4%. This development is a result of shifts to other migration routes but also of enhanced cooperation between North African countries and the EU on migration.[5]

The increase of detections along the Central Mediterranean Route can largely be attributed to migrants from sub-Saharan countries of origin. Ranked in order of total numbers, detections related to nationals from Guinea grew by 452.1%, from Côte d'Ivoire by 305.3%, from Burkina Faso by 3,708.2%, from Mali by 568.0%, from Cameroon by 315.6% and from Sudan by 373.0%. On the one hand, the steep increase in arrivals is attributed to the growing political and economic instability in countries of origin and the resulting lack of prospects, particularly for the young population. On the other hand, it is also a consequence of the increasingly restrictive stance of North African States towards migrant populations on their territory. A tense economic situation combined with emerging negative public narratives towards immigration led to a significant increase in the authorities' enforcement of anti-irregular migration measures. In order to escape the increasing social and political pressure, many migrants decided to leave for Europe instead.

North African countries are likely to continue pursuing a stronger focus on return to countries of origin for populations residing irregularly on their territories. Consequently, It is quite likely that many migrants will try to make the dangerous and expensive journey across the Mediterranean to reach Europe. It could therefore well be the case that, despite closer cooperation on migration issues between the EU and its North African partners, the number of crossings via this route continue to

[4] See below the 'Migration Trends' section.
[5] See below the 'Migration Policy Development' section.

increase in 2024 by way of secondary flows. Again, European and North African partners are called to devise mutually beneficial solutions addressing the return and secondary movements of irregular migrants.

Syria and direct neighbouring countries

The Syria crisis, now in its 13th year, persists as the world's largest displacement situation, with over 12 million Syrians forcibly displaced. Numbering 6.5 million, Syrians remain the largest refugee population in the world. The February 2023 earthquakes worsened the situation, affecting 8.8 million people and causing large-scale destruction of housing and infrastructure. In addition, 15.3 million Syrians had needed humanitarian assistance, marking the highest number since the crisis began.

Syria's economy is dire, critical infrastructure is largely destroyed and the humanitarian situation worsened further in 2023. The economic crisis, a weakened national currency and runaway inflation are contributing to soaring living costs, forcing an even larger proportion of the population to rely on humanitarian aid. At the beginning of winter, 5.7 million people were considered in need of support in terms of critical shelter and household items. A recent socio-economic survey confirmed that even those who are not in immediate need of humanitarian aid can barely manage to afford housing costs, struggle to provide sufficient food for their families or to afford basic consumer goods, and have no access to drinking water, hygiene products or medical services. School attendance is low, and children often have to contribute to the household income.[6]

The impasse on the peace process and a strategic stalemate between the conflict parties raise concerns about deeper fragmentation and escalation in 2024. Last year, Syria witnessed the worst surge in violence in over three years, including intensified attacks on government-controlled areas and terrorist activities. The current situation is deemed the most volatile in a long time, especially in view of the spillover of the Israel-Hamas conflict that has already started, with airstrikes hitting Aleppo and Damascus airports, and disrupting vital humanitarian services.

85% of all Syrian refugees are hosted in neighbouring countries. The major host countries in the region (Lebanon 790,000, Jordan 651,000 and Egypt 152,000) face serious economic challenges and, in the aftermath of the February earthquakes, are under heightened pressure for refugees to return. Although actual refugee returns to Syria remained fairly low in 2023, a thaw in relations between the Syrian government and countries in the region sparked fears among the Syrian diaspora that the number of expulsions will rise steeply this year. In view of the further deterioration of the security and economic situation in Syria, many Syrians will try to reach or to remain in a safe country this year too, and will not be able or willing to return to their home country. As the sense of hopelessness among

[6] (2023) Potkanski-Palka, M., Syria. Socio-Economic Survey 2023, Dossier, Country of Origin Information Unit (Staatendokumentation), Austrian Federal Office for Immigration and Asylum.

the Syrian population inside and outside of the country is likely to deepen further, both primary flows from Syria and secondary flows from the major host countries might grow again in 2024.

Gaza

According to the most recent report of the United Nations Relief and Works Agency for Palestine Refugees in the Near East (UNRWA), up to 1.9 million people, or 85% of the population, have been displaced across the Gaza Strip since the escalation of the Israel-Hamas armed conflict in October 2023. At the beginning of 2024, a total of 1.88 million internally displaced persons received assistance from UNRWA.

Authorities in Gaza reported that three months into the war, tens of thousands of Palestinians have lost their lives during the fighting and that the large-scale destruction of buildings and infrastructure has made the area almost 'uninhabitable'. At the end of 2023, over 90% of the population in the Gaza Strip (about 2.08 million people) faced high levels of acute food insecurity and were cut off from access to most basic goods and services, including basic medical aid. Much needed humanitarian assistance is organised by the international community, but the supply entering Gaza is largely insufficient, a situation that will remain or even worsen as long as hostilities last. Even if the violence were to stop, at this stage two thirds of Gazans would not have homes to return to.

There is no precedent for large-scale numbers of people fleeing from Gaza during conflict or armed clashes, but also none for the degree of destruction and displacement of the current war. Most inhabitants in Gaza would not relocate to another country even if given the opportunity, citing concerns about enduring displacement reminiscent of the events in 1948. The descendants of the Palestinians displaced at the time and in subsequent conflicts number almost 6 million. Today, more than 1.5 million of the Palestinian refugees registered by UNRWA live in refugee camps in Jordan, Lebanon, Syria, the Gaza Strip and the West Bank. Already hosts to large refugee and migrant populations and concerned about internal security, neighbouring countries are seriously concerned by the possible displacement of large numbers of Palestinians and have communicated accordingly.

Libya

Traditionally, Libya is host to a large migrant population, composed of refugees, labour migrants and undocumented groups, as well as being an important point of departure for refugees and irregular migrants headed towards the EU along the Central Mediterranean Route. Following a trend already observed in 2022, this route gained further importance in 2023, with a 61% increase in irregular arrivals in the EU departing from Libya and Tunisia.

Migration environment and developments with regard to departures towards Europe are closely linked to the political situation in the country. In 2023, two years after the indefinite postponement of the December 2021 Libyan national elections, a political impasse persisted between the UN-recognised Government of National Unity (GNU) in Tripoli and the eastern-based Government of National Stability

(GNS) aligned with the Libyan National Army (LNA), a political stalemate that continues to exacerbate political and economic instability. The 2020 ceasefire generally holds, but clashes and violent incidents confirm persisting tensions. The humanitarian situation was further aggravated by the impact of Storm Daniel, causing significant casualties and displacing over 43,000 people.

The Libyan economy experienced a 14% growth in 2023, as reported by the World Bank, marking the highest increase in the Middle East and North Africa region. Whilst projections indicate continued growth of over 4% in the next two years, the economic forecast for 2024 appears to face challenges stemming from the recent conflict between the Prime Minister of the GNU and the Governor of the Central Bank over the extent of public spending by the GNU.

Furthermore, IOM field reports indicate a rise in economic opportunities for migrants in certain municipalities. This increase is particularly notable in areas with relatively stable security conditions and improved reliability of the electricity network. As per IOM, migrant unemployment rate remains steady at 16%, consistent with pre-COVID-19 pandemic levels of 17%. It should be noted that the fallout of Storm Daniel and a challenging economic situation disproportionately affected the more than 700,000 migrants in the country.

A large proportion of the crossings from Libya and other Southern Mediterranean countries did not involve migrants in transit, but people who had originally wanted to stay and work in Libya and other Southern Mediterranean countries, but who felt compelled to leave for Europe due to the economic situation and the expulsion policies geared at irregular migrants. Last year, Libyan authorities reported 11,465 people apprehended and returned, marking a significant increase compared to 2022.

To conclude, Libya will most probably remain a key partner in 2024, despite the criticism of the Libyan authorities' actions with regard to human rights violations and alleged illegal pullbacks of boats heading to Europe. A sustainable reduction in irregular crossings and prevention of deaths across the Mediterranean – IOM recorded 2,346 missing migrants in the Central Mediterranean in 2023 – is unlikely to be achieved through control measures alone. To this end, European countries, Libya and countries of origin will have to find mutually beneficial solutions that consider the priorities of both parties, and the needs and interests of migrants.

Lebanon

Lebanon is facing a multi-layered crisis with grave and progressively evident humanitarian concerns. The country's severe economic situation – including the devaluation of Lebanon's currency by 90% – aggravated by the COVID-19 pandemic and the catastrophic impact of the Beirut Port Blast, resulted in over 74% of the population living in poverty, with the refugee population being particularly affected.

Since last year, Lebanon continues to be governed by a caretaker government and the Lebanese parliament has failed, for the twelfth time, to elect the President of the Republic. Meanwhile, the spill-over effect of the Syrian crisis has continued with hostile sentiment towards Syrian refugees growing. The Lebanese authorities have reacted by adopting increasingly strict polices towards refugees, with Lebanon embarking on a plan for the safe return and voluntary repatriation of displaced Syrians to Syria. Yet the number of displaced Syrians returning to Syria remained limited, with UNHCR verifying around 24,400 returns in the initial eight months of 2023.

Furthermore, after the escalation in the Gaza conflict in October 2023, almost daily cross-border artillery firing and drone attacks between Israeli forces and Hezbollah fighters have forced thousands of people on both sides of the borders to flee their homes. On the Lebanese side, the escalations led so far to the internal displacement of around 100,000 people, according to the Lebanese Government.

The dire economic situation and the threat of return have already led to an increase of irregular boat departures from Lebanon to Cyprus and Italy. High costs, cooperation between border management authorities of origin and destination country, slow financial means of refugees in Lebanon and the restricted capacities for organising crossings by boat will limit overall arrivals to Europe via this route in 2024 – at least in comparison to other routes and means of transportation. Nonetheless, the authorities of Lebanon have recently refused to accept the return of a group of migrants from Cyprus via boat, in contrast with an existing cooperation agreement between Cyprus and Lebanon for the return of irregular migrants.

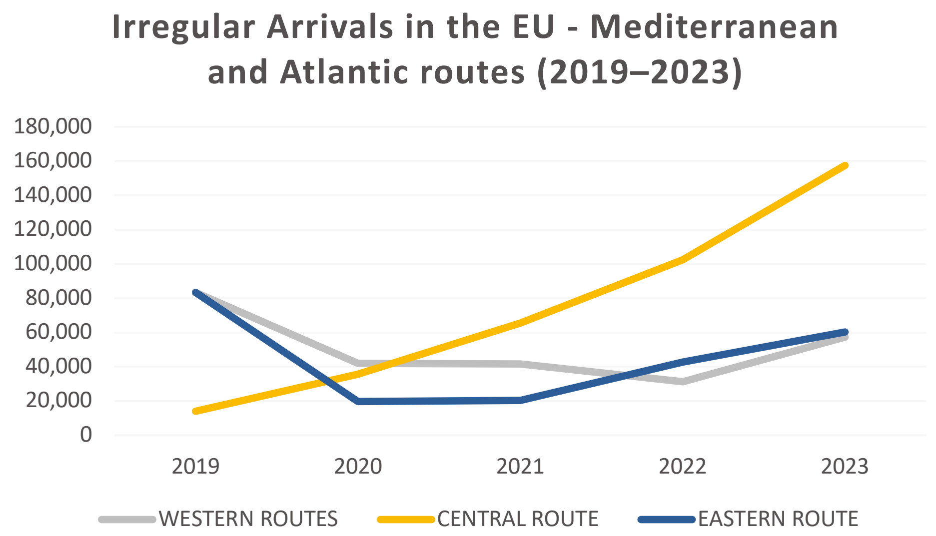
The particularly fragile situation of the Lebanese economy and the increasingly hostile environment faced by refugees in Lebanon might incentivise both the primary movements of Lebanese nationals and the secondary movements of refugees from Lebanon to other locations in the region. While EU's migration cooperation efforts are likely to be more focused on North Africa, future developments in the Middle East, and particularly in Lebanon, are predicted to have an important impact on the regional migration outlook of 2024.

Migration trends in the region

Irregular migration

In 2023, over 274,800 migrants reached Europe across the Mediterranean and the Atlantic Ocean irregularly, travelling largely by sea from Libya/Tunisia to Italy – through the Central Mediterranean route – and from Türkiye to Greece – through the Eastern Mediterranean route (see Figure 1 below). 2023 figures show that there was roughly a 35% increase from the numbers registered in 2022, **and indicate the highest levels of irregular arrivals in the region since 2016**. This trend is likely the result of persistent and widespread political instability experienced by countries in the Sahel and Sub-Saharan Africa, coupled with the increasingly strict migration policies adopted by the governments of some North African countries in response to their complex economic situations and heightened migratory pressures. Indeed, while figures of irregular migration towards Europe are often provided through the significant means available to collect and consolidate data on the European side, mirroring such data collection process on the southern shores is more complicated. Nevertheless, the limited availability of data should not be interpreted as irregular migration being a phenomenon solely affecting Europe for it equally impacts Northern African and Middle Eastern countries.

A significant surge in irregular crossings is observed on all main migratory routes from and across the region. The Central and Eastern Mediterranean routes confirmed the previous year's trends by registering a growth of 50% and 55% respectively, whereas the Western routes – including irregular arrivals mainly from Morocco to Spain – saw a resurgence in 2023 fuelled by an almost threefold increase in the numbers of migrants reaching the Canary Islands via the Atlantic Ocean. Consolidating a trend that began in 2020, **the Central Mediterranean route remains, by a large margin, the most active in the region**, accounting for more than half of the total number of detected crossings. Despite the registered increase, flows on the Western and Eastern Mediterranean routes remain substantially below pre-pandemic levels. This is likely due to the effective border management policies adopted by Morocco and Spain in the Western routes, and by Türkiye and Greece throughout the Eastern route. Nonetheless, the general increase of irregular migration flows might signify that the ability of border control systems to limit irregular flows is reaching its limit vis a vis the intensification of migratory push factors in Africa.



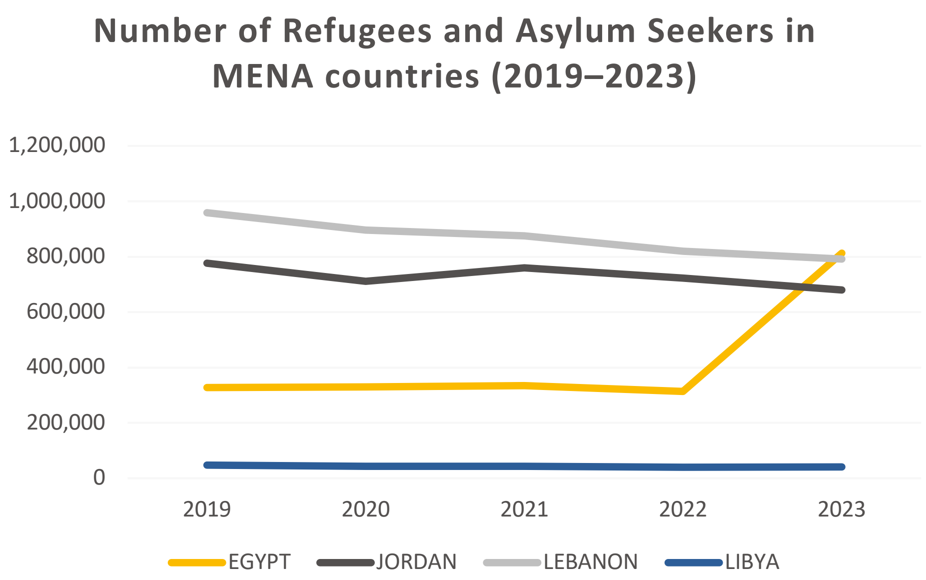
Source: FRONTEX

With a significant increase since 2022, an estimated 4,088 people have lost their lives or were reported missing while traversing the Mediterranean Sea to reach Europe in 2023. This figure makes the Mediterranean routes the deadliest on record.

Around 61% of all registered irregular maritime migrants were men, 15% were women, and 24% were children. The four most represented countries of origin of irregular migrants apprehended in the Mediterranean Sea were: Syria (30,725), Guinea (18,648), Tunisia (17,904) and Côte d'Ivoire (13,894). These data are partly consistent with the trend observed last year: the number of Tunisians remained stable, and the number of Syrians continued its progressive growth. This progressive growth started in 2021 and is likely the result of secondary movements from Lebanon, Türkiye or direct departures from Syria due to the worsening of the local situation. Conversely, a notable shift occurred with regards to Egypt, that experienced a 50% decline – possibly attributable to the heightened cooperation between the EU and the Egyptian Government on irregular migration; and Guinea/Côte d'Ivoire, whose nationals approximately tripled and doubled respectively in numbers from last year.

Refugees and asylum seekers' influx

The Mediterranean region continues to host one of the largest concentrations of refugee populations in the world. **Egypt experienced an extraordinary influx of refugees and asylum seekers**, with numbers increasing from roughly 313,000, in 2022, to almost 813,000 at the end of 2023 (see Figure 2 below). This exponential growth can be attributed to the outbreak of the armed conflict in neighbouring Sudan, which has resulted in the international displacement of over 1.5 million people, including an estimate of 460,000 individuals who have sought refuge in Egypt. Despite remaining very high in absolute numbers, the size of the refugee population in the Middle East, conversely, decreased last year, with the UNHCR estimating refugees/asylum seekers in Jordan and Lebanon to be just over 679,000 and 791,600 respectively. This solidifies a downward trend in the region, particularly noticeable in Lebanon, where the number of refugees has experienced an over 20% reduction since 2017. The decrease is likely linked to the announced plan of the Lebanese Government to commence operating returns of Syrian refugees, and the deterioration of the economic crisis in Lebanon, which might have triggered secondary movements of refugees and asylum seekers to neighbouring countries and beyond.



Source: UNHCR

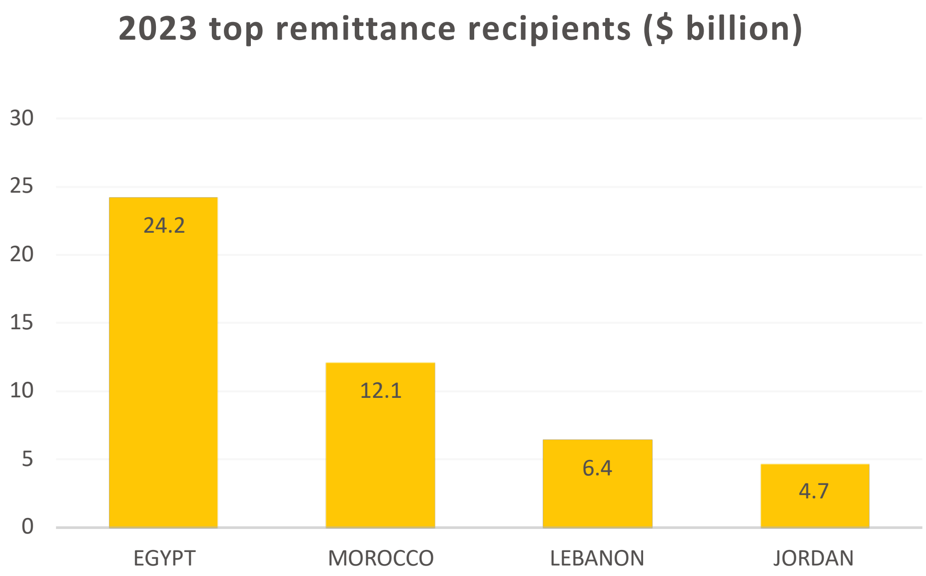
Syrian refugees remain prevalent throughout the region, although the influx of Syrian refugees to neighbouring countries remained substantially stable. Refugee returns to Syria have increased significantly in the last few years but remain low, with around 24,400 Syrians opting for voluntary repatriation in the first 8 months of 2023. The total number of resettlement submissions from Jordan and Lebanon have remained substantially stable from last year, reaching around 15,600 at the end of October 2023.

Remittances

After falling by 4.5% in 2022, remittances to Middle East and North African countries were expected to have declined further by 5.3% in 2023. The overall decrease was mainly driven by inflows to Egypt – which were projected to drop by around 15% to $24.2 billion – and likely correlated to the significant gap between the official and parallel foreign exchange rates, which might have incentivised the Egyptian diaspora to use informal remittance channels. Despite the negative trend, Egypt remained by far the top recipient in the region (see Figure 3 below) – with ties to Egyptians living in countries of the GCC.

Contrary to the general trend, but consistently with the country's upward trajectory of the past years, Morocco has experienced a moderate growth in remittances which were expected to rise by 8.6% to $12.1 billion in 2023. Interestingly, the pace of remittances to Morocco has been particularly strong after the earthquake in September 2023 and will likely help alleviate some of the reconstruction costs and support the country's external financial stability.

Inflows of money to Lebanon and Jordan – estimated at $6.4 and $4.7 billion respectively – remained substantially stable since 2022.



Source: KNOMAD

In 2023, remittances continued to account for a substantial portion of the GDP of several countries in the region, particularly in Lebanon (27.5%), Palestine (19.9%) and Jordan (9.9%). Despite a projected 10% decrease of remittance dependency since 2022, Lebanon remains one of the most vulnerable economies in the region as the country faces debt restructuring, hyperinflation, and a sharp devaluation of its currency.

Finally, despite significant variations across corridors, the cost of remittances in the region decreased from an average of 6.4% (in the fourth quarter of 2021) to 5.9% (in the second quarter of 2023), representing the only decline in remittances among developing regions.

Expected migration trends for 2024

In 2024, the drivers of mobility related to socio-economic struggles, armed conflicts, and environmental risks will most likely continue to have an impact on mobility in the region, although there is uncertainty about how they will develop.

The humanitarian crisis in Sudan is expected to deteriorate through 2024, increasing the insecurity of the whole region and resulting in a continuation of the upward trend of irregular migration flows registered in 2023 – particularly to Egypt. Furthermore, the enduring political instability and deterioration of living conditions in the Sub-Saharan African and the Sahel countries, and the tightening of migration policies in the Maghreb might further increase the number of people moving to other countries in the region and irregularly transiting to Europe.

The persistent armed conflicts in Ukraine and Ethiopia, and the more recent escalation of the conflict in Gaza – coupled with the effect of climate change on water availability and agriculture – are likely to exacerbate the fiscal pressures, slow growth and steep unemployment experienced by countries in the region, and to push thousands of people into poverty. While such impact is unlikely to directly influence migration flows across the region in 2024, it might increase the number of people who, in the upcoming years, will consider internal mobility or migration as a viable option to increase their safety and economic perspectives.

The presence of refugees and asylum seekers in the Middle East is certain to remain a major challenge in the region in 2024. This prediction is supported by the deterioration of the security and economic situation in Syria, and by UNHCR's latest return intention survey (conducted in early 2023) which indicates that while most Syrians wish to return one day (56%), only a small number planned to do so within the following year (1.1%).

The pace of remittances is expected to moderately decrease in 2024, although, this trend might be counteracted by the efficacy of the set of policy measures adopted by the Government of Egypt to incentivise the use of formal money transfer channels.

Regarding labour migration, the prevalence of labour shortages in EU countries across many sectors may put common objectives such as the green and industrial transitions at risk, and push policy makers to expand labour migration opportunities, either by instruments such as the EU Talent Partnerships or through the conclusion of bilateral labour agreements. Nonetheless, the current complexity and fragmentation of the relevant EU framework, and the slow recovery of GCC countries from the effect of the pandemic and of plummeting oil prices suggests that a sharp increase in the level of labour mobility within the region is unlikely in 2024. This prediction is further strengthened by the expected importance that irregular migration across the Mediterranean is expected to play in EU political debates. This might focus regional cooperation efforts on security related topics whilst EU Member States seem to particularly consider other regions such as Latin America or South-East Asia for enhancing labour migration cooperation.

Migration policy developments

Responding to the call of the New EU Agenda for the Mediterranean, the EU concluded several agreements with Southern Partner Countries (SPCs) in 2023.

These include the signing of a Memorandum of Understanding with Tunisia detailing a comprehensive partnership that links a joint effort on curbing irregular migration and increasing returns with support actions in the field of macro-economic stability, economy and trade, people to people contact and green energy transition. Among other areas, it envisions closer collaboration around maritime search and rescue operations, tighter border management and the disruption of smuggling organisations in Tunisia. It also facilitates the return and readmission of Tunisians who have entered the EU irregularly, as well as expanded pathways for regular migration and seasonal work.

A similar deal was also announced with Egypt at the Tenth Meeting of the EU-Egypt Association Council which took place in Brussels on 23 January 2024. The two parties agreed on the importance of adopting a comprehensive approach to migration governance which includes regular migration pathways, return and reintegration, as well as measures to tackle the root causes of migration, migrant smuggling and trafficking in persons. Aside from migration management, the agreement includes a commitment to cooperate on peace and security, food and water management, climate change and energy diversification.

In addition, a number of important migration-related bilateral partnerships between EU Member States and African countries have been negotiated and signed in recent times. After several official announcements last year, the Italian Government launched a partnership with Africa called 'the Mattei Plan' after Enrico Mattei, the founder of Italy's only state-owned oil company and the initiator of past energy partnerships with Africa. The Plan, which was officially unveiled in January 2024 in Rome during a summit between African Leaders and European Union officials, has declared the dual objective of boosting economic growth in African countries, and curbing irregular immigration to Europe. In line with the Plan, a cooperation agreement between Italy and Libya was reached to increase gas production and strengthen the capacity of the Libyan coastguard to control migratory flows.

Furthermore, in March 2023, Spain and Morocco signed a series of wide-ranging agreements focused on improving migration management and boosting investments in the two countries, whereas

Germany and Morocco, early this year, agreed on a comprehensive migration partnership aimed to strengthen labour migration pathways and facilitate the return of irregular Moroccan migrants from Germany.

The content of these partnerships reflects the different importance that EU Member States and SPCs ascribe to migration, which usually plays a paramount role in political debates in Europe whilst it remains a low priority issue for countries in the Middle East and North Africa. The above-mentioned cooperation efforts attempt to resolve this hiatus by linking migration to other policy areas, such as energy security and economic development, that are of higher interest for countries of the South of the Mediterranean and may increase the chances of achieving mutually beneficial results.

The widespread dissatisfaction among European electorates with high levels of irregular migration and asylum applications might also explain the tendency of some EU countries to seek deals with relevant SPCs independently from the EU. Ruling governments might want to claim ownership over these efforts to prove that they are capable of developing and implementing policies that address migration issues in a sustainable manner and bring down the numbers of irregular arrivals in their country.

Conclusions for 2024

The 2024 Euro-Mediterranean migration profile 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.

The interest in the region is likely to remain high among migration policy makers in Europe, due to the increased levels of irregular migration to the EU from the Southern Neighbourhood, and due to the important role that migration is expected to play in European elections, including the European Parliament elections in June 2024.

Migration cooperation efforts between EU Member States and SPCs will continue to focus primarily on reducing irregular migration, although the salience of major geopolitical events affecting the region – such as the war in Gaza, the economic effect of the Ukraine crisis, and the impact of climate change on food/energy security – might prompt EU countries to include migration governance measures in the context of opportunities related to investment, growth and social mobility. This might open up the possibility, for both EU Member States and SPCs, to utilise migration as an instrument to address some of the security, economic and social concerns that are high on the agenda of SPCs.

In this context, the importance of remittances for the economies of several countries in the region, particularly vis a vis the reconstruction costs following the destruction caused by disasters and conflicts, will likely lead the governments of SPCs to adopt policy measures aimed to encourage the engagement of their respective diasporas and the use of official remittance channels.

Finally, the numerous 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, particularly in the Middle East. Consistently with previous years, ‘responsibility-sharing’ in the context of refugee protection is likely to be an important topic of discussion in migration policy debates.

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