



ICMPD

Migration Outlook 2024

Ten migration issues to look out for in 2024
Origins, key events and priorities for Europe



Ten migration issues to look out for in 2024

1. Record displacement levels due to war and conflict

Notwithstanding the complex and multifaceted nature of migration, state fragility and violent conflict are of paramount importance for current migration trends. The number of armed conflicts has almost doubled over the last decade, correlating to a doubling of the number of forcibly displaced persons, both internally and across borders. Their number reached 114 million in 2023, the highest since the beginning of the century. Once final data are in, the EU will have received well over 1 million asylum applications last year, representing a preliminary 21.3% increase in comparison to 2022 and the highest number since 2016.¹ Again, the majority of applicants originated from the major global conflict zones. Unless the trend towards growing displacement is reversed, migration pressures will persist and lead to high numbers of irregular arrivals and asylum applications in 2024 as well.

2. The intertwining of geopolitics and migration

The world has entered a period of increasing volatility, characterised by systemic rivalry between the world's great powers, a polynodal international order, greater state fragility, an increasing number of violent conflicts, rising terrorism, the weaponisation of energy and food insecurity. Geopolitics has its part in migration. Displacement is the consequence of military operations, but also of attempts to enforce other States' concessions by means of forced migration. Security concerns are the basis for refusals of entry or the expulsion of immigrant populations. Interlinkages between migration and foreign relations are gaining in significance. The 2023 Nigerien coup d'état, amongst other reasons also linked to geopolitical competition in Africa and diminishing European influence, will impact cooperation between the EU and Niger on migration issues in 2024. In the United States of America, approval of Congress for foreign aid packages, including financial support and arms supply for Ukraine, Israel and Taiwan, is tied to a tightening of migration policies at the southern border. If no compromise can be reached, a largely domestic policy issue will have serious repercussions on global security and stability in 2024, a development that would certainly lead to more displacement and irregular migration as well.

¹ Calculation based on the most recent data at the time of writing.



3. A further securitisation of migration

Securitisation refers to the perception of migration as a key security issue and/or threat to the security of States and societies. The term is regularly discussed in the context of EU migration policy and the externalisation of border and migration control to neighbours or countries situated at important migratory routes. Securitisation is not exclusive to EU migration policy, however. In 2023, the governments of Pakistan, Iran, Algeria and Tunisia either introduced or intensified repatriation policies and programmes to enforce existing legislation, but also to respond to security concerns among their own populations and terrorist threats associated with certain immigrant groups. In 2024, related policies will presumably continue and affect additional hundreds of thousands of people worldwide.

4. Increasing significance of secondary movements

Further securitisation of migration in the wider neighbourhood will play its part in growing levels of secondary migration towards the EU. The continued expulsion of migrants who are considered to be staying illegally or to pose a security threat in their host countries will prompt many of them to attempt a move towards a safe country in Europe. In 2023, the share of nationals from sub-Saharan African countries among all arrivals on the Central Mediterranean Route increased to 40% from 5% in 2022. This was caused by increasing political and economic instability in countries of origin but was also attributed to secondary flows from North African countries, a trend that is likely to persist in 2024.

5. Growing numbers of migrants in countries in crisis

In 2022/2023, a series of natural disasters in important origin and transit countries of migration to Europe displaced millions of people but also put additional constraints on already stretched capacities for hosting large populations of refugees and migrants. The speed at which affected countries manage to rebuild and recover from disaster will influence their stance towards residing migrant populations and the question of their repatriation. Consequently, the level of support provided by the international community for countries in crisis will influence the size and direction of primary and secondary migration flows in 2024 and beyond.



6. The pivotal role of migration in election campaigns

2024 is a big election year. In 50 nations, about 2 billion people will be called to the ballots. In Europe, national and European elections are expected to bring gains for the political right and populist parties. Migration will feature as a central theme in European campaigns but also in the run-up to the US presidential election in November. In view of widespread dissatisfaction among electorates with high levels of irregular arrivals and asylum applications, ruling governments and parliamentary majorities will try to prove that they are capable of delivering on policies that address irregular migration and asylum in a sustainable way and bring down the numbers of arrivals in their country.

7. A European focus on external processing of asylum

In 2023, much of the debate and many of the initiatives discussed or already implemented centred around external processing or “asylum offshoring”, namely the pre-arrival processing of an asylum claim by a destination country while a protection seeker is in another State. External processing includes the granting of humanitarian visas, state-led evacuation programmes for people in need, and the establishment of processing centres outside destination countries where asylum procedures are conducted. Processing centres can enhance access to protection by offering more safe pathways than other channels. However, they are discussed more in the context of deterring spontaneous arrivals, making destinations less attractive for asylum seekers and reducing overall application numbers. Recent European developments, like the agreement between Italy and Albania and the cooperation initiatives with Rwanda, focused less on protection aspects and more on the deterrent effects of external processing. This will also be the case in 2024.

8. Labour migration “coming of age” in Europe

The political debate in Europe in 2024 will primarily revolve around the issues of irregular migration and asylum. However, this does not mean that there will be no significant developments in the area of legal migration as well. Quite the opposite will be the case. A non-exhaustive list of last year’s developments includes new legislation to facilitate labour migration in Member States; higher quotas for non-EU workers; the extension of occupation shortage lists; special permits to fill specific occupations; the introduction of job search visas; the streamlining of skills recognition; regularisation programmes; further conclusion of migration and mobility agreements; the proposed establishment of an EU Talent Pool; and the building of new institutional frameworks to support employment of foreign workers and active recruitment in countries of origin. These developments will continue and see additional progress in 2024. Member States will particularly seek to cooperate with countries with compatible or at least comparable educational and training standards, for instance in Latin America or South-East Asia, to meet growing demands and to navigate the obstacles of skills mismatch.



9. A pivotal year for the economic integration of Ukrainian beneficiaries of temporary protection

As of October 2023, there were 4.3 million (Ukrainian) beneficiaries of temporary protection registered in the EU who, when of working age, benefit from direct access to the labour markets. Despite a formally similar starting position, the actual enrolment of Ukrainians developed quite differently in the individual Member States and ranged from 17% to 77%. Notwithstanding the overall faster enrolment of Ukrainians compared to previous refugee cohorts, the high educational qualifications of the mainly female Ukrainian refugees have not translated into sufficient and adequate employment opportunities, with many confined to low-skilled and low-paid jobs. With temporary protection reaching its maximum duration in 2025, this year is likely to see a reinforced debate on the future status of beneficiaries as well as on their economic and labour market integration. Normally, the third year after arrival is also the year when labour market participation of refugees starts to rise significantly. In the case of Ukrainian beneficiaries of temporary protection, the debate will centre around expanded and more targeted training programmes, which allow for a better use of educational attainments, avoid further “brain waste”, and secure in-demand skills for European labour markets.

10. A revamp of EU visa policy to reduce irregular arrivals?

Last year, and following the abolishment of visa-free entry to Serbia, the number of arrivals of asylum applicants from a number of origin countries with low prospects of obtaining a protection status decreased significantly in comparison to 2022. This observation suggests that visa policies can be an effective means of curbing irregular migration, at least if there is no acute displacement situation, and political cooperation is sought with countries of origin and transit. In October, the European Commission proposed a renewed Visa Suspension Mechanism that should allow for quicker responses in the case of instrumentalisation, hybrid threats and increased irregular arrivals due to a lack of alignment with the EU’s visa policy. In the past, the preservation of bilateral economic and political relations often took priority over migration control interests and made visa suspension a weak instrument, which is rarely used in connection with important non-EU partners. In view of the more than 1 million asylum applications in 2023 and the pivotal role migration will play in this year’s elections, this premise might change in 2024.

Introduction

ICMPD's Migration Outlook presents a brief analysis of recent migration and policy trends and provides an outlook on developments and events to watch out for in 2024. It does not claim to foretell the future or to cover all relevant trends. It aims to use past experience and highlight what might happen and is important to consider.

The world is in a period of increasing volatility, characterised by systemic rivalry between the world's great powers, a polynodal international order, greater state fragility, an increasing number of violent conflicts, rising terrorism, the weaponisation of energy and food insecurity. Geopolitics has its part in migration. Displacement is the consequence of military operations, but also of attempts to enforce other States' concessions by means of forced migration. Notwithstanding the complex and multifaceted nature of migration, state fragility and violent conflict are of paramount importance for current migration trends.

The number of armed conflicts has almost doubled over the last decade, correlating to a doubling of the number of forcibly displaced persons, both internally and across borders. Their number reached 114 million in 2023, the highest since the beginning of the century. Once final data are in, the EU will have received well over 1 million asylum applications last year, representing a preliminary 21.2% increase in comparison to 2022 and the highest number since 2016.² Again, the majority of applicants originated from the major global conflict zones. Unless the trend towards growing displacement is reversed, migration pressures will persist and lead to high numbers of irregular arrivals and asylum applications in 2024 as well.

The high numbers of irregular arrivals and asylum applications will dominate this year's European debate but also election campaigns in Member States, for the European elections and the US presidential election. This, however, should not imply that the areas of legal and labour migration will not see significant developments as well. The opposite will be the case. In many ways, European labour migration policies will "come of age", further professionalise and apply previously learned lessons in the framework of new policies and broader geographic coverage. In this regard, the enhanced labour market participation of Ukrainian beneficiaries of temporary protection and their access to meaningful work will be a major issue, in relation to their own prospects but also in regard to the growing demands for skilled workers in Europe.

Focus regions

In 2024, the situation in the wider European region will be shaped by migration-related developments in the Near and Middle East, South Asia, African regions and Eastern Europe. This does not mean that other geographic areas deserve less attention, but the major migration movements towards Europe will be linked to the situation in these regions.

² Calculation based on the most recent data at the time of writing.

Afghanistan

The Afghan refugee population is one of the largest worldwide. According to recent figures, there are 2.6 million Afghan refugees registered globally, 2.2 million of them in the neighbouring countries of Iran and Pakistan. According to UNHCR, a total of 5.7 million Afghans are believed to be in need of international protection.³ Many more millions of Afghans stay in these two countries as labour migrants or in an undocumented way. Another 3.5 million people are considered displaced within Afghanistan. After decades of conflict and humanitarian crises, the Taliban takeover in 2021 prompted a surge in displacement. An estimated 1.3 million Afghans had fled to the neighbouring countries by December 2022.⁴ Due to a drop in hostilities, the pace of internal and cross-border displacement slowed in 2022 and 2023. However, due to the severe humanitarian challenges in the country, compounded by earthquakes, migration-related issues, a deteriorating human rights situation, and the broader context of conflict and underdevelopment, Afghanistan will remain one of the largest displacement situations in 2024. Although the security situation improved, the economic and human rights situations continued to worsen last year. Between 2021 and 2023, the Afghan economy contracted by 25%, not least because of the Taliban government's restrictive policies on women's education and work.⁵ Last year over 70% of Afghanistan's population, amounting to nearly 30 million people, required humanitarian assistance. The situation was exacerbated by four earthquakes in the Herat province, causing human casualties and widespread destruction. More than 275,000 people were directly affected and more than 250,000 houses destroyed or damaged. The earthquakes disproportionately affected vulnerable communities already grappling with decades of conflict and underdevelopment. The human rights situation deteriorated further, particularly for women and girls, excluding them from most aspects of public and daily life. For many of them, daily survival now depends solely on the income of their husbands and fathers, who in turn are dependent on work opportunities in the neighbouring countries of Pakistan and Iran.

The Pakistani and Iranian governments' decision to repatriate migrants illegally residing on their territories and the sudden return of hundreds of thousands of Afghans to their home country, particularly before and during winter, is expected to worsen Afghanistan's already severe humanitarian crisis.⁶ The various aspects of this crisis in conjunction with the changing policy environment in the main destination countries will increase the potential for emigration from Afghanistan and for secondary movements from the neighbouring countries towards Türkiye and the EU. In the first 10 months of 2023, however, both apprehensions of Afghan nationals at the EU external borders and asylum applications submitted in the EU decreased in comparison to 2022, a development that not many would have expected against the backdrop of the overall situation outlined above. This

³ UNHCR, Global Trends 2022, accessed 5 January 2024, <https://www.unhcr.org/global-trends-report-2022>, p. 3.

⁴ UN OCHA (United Nations Office for the Coordination of Humanitarian Affairs), Afghanistan: Snapshot of Population Movements (January to November 2022), accessed 5 January 2024, https://reliefweb.int/report/afghanistan/afghanistan-snapshot-population-movements-january-november-2022-23-november-2022?_gl=1*igrbpc*_ga*MTIyNTY2NjY0Mi4xNjczMdGzNDU1*_ga_E60ZNX2F68*MTY3MzA4MzQ1NS4xLjAuMTY3MzA4MzQ1NS42MC4wLjA.

⁵ The World Bank, Afghanistan Development Update, October 2023.

⁶ UN Security Council Report, Afghanistan, December 2023 Monthly Forecast, posted 30 November 2023, accessed 4 January 2024, <https://www.securitycouncilreport.org/monthly-forecast/2023-12/afghanistan-23.php>.

development can be attributed to the strict border control measures imposed by Türkiye and others, but perhaps also to the fact that the majority of refugees and prospective migrants from Afghanistan do not have the financial means available to fund the expensive journey to Europe or to pay migrant smugglers for their services.

Pakistan

Pakistan is one of the world's most important countries of origin and destination for international migration. More than 11 million Pakistani nationals work abroad as labour migrants. It is estimated that around 540,000 Pakistanis left their homeland to work abroad last year, mainly in Saudi Arabia, the United Arab Emirates, Oman and Qatar. European countries are important destinations as well but can often only be reached irregularly due to a lack of legal migration channels. In 2023, Pakistani nationals ranked 10th among all persons detected crossing a Schengen border in an irregular way and 8th among all applicants for asylum in the EU. Households and domestic economy heavily depend on labour emigration. With a total of USD 24 billion, equivalent to 7.0% of the GDP, Pakistan was the 8th most important migrant remittance receiving country in 2023. Remittances have gone down by 23% since 2021, however, and are expected to decline by 10% in 2024, dropping below USD 22 billion.⁷ Pakistan's economy contracted in 2023 and poverty increased due to deteriorating wages, high inflation and the heavy damage caused by the floods.⁸

The difficult economic situation and low expectations of a return to growth together with concerns regarding internal security prompted Pakistan's government to announce an Illegal Foreigners Repatriation Plan in October of last year. The plan applies to all foreigners residing in the country illegally but mainly affects Afghan nationals.⁹ Pakistan hosts an estimated 3.7 million Afghan immigrants, refugees and undocumented migrants, 600,000 of whom arrived in the wake of the Taliban's takeover of Afghanistan in August 2021.¹⁰ In 2022, the government had registered "1.3 million Afghan refugees with Proof of Registration (PoR) cards, 129,703 unregistered members of registered families (UMRFs), 840,000 Afghan nationals with Citizen Cards and approx. 775,000 undocumented migrants from Afghanistan".¹¹ On 3 October 2023, all irregular immigrants were ordered to leave the country by 1 November or face deportation by the authorities. The Pakistani government explained this step as necessary to enforce existing migration legislation but also in order to react to the Taliban government's alleged support for extremists in Pakistan.¹² According to UNHCR, approx. 428,300 persons had returned to Afghanistan by the end of November, mainly those who had stayed

⁷ Ratha, D., Vandana, C., Kim, E., Plaza, P. and Shaw, W., Migration and Development Brief 39: Leveraging Diaspora Finances for Private Capital Mobilization (December 2023), World Bank, Washington, DC, p. 45.

⁸ The World Bank, Pakistan's strong post-pandemic recovery came to a halt in FY23, accessed 5 January 2024, <https://www.worldbank.org/en/country/pakistan/overview>.

⁹ Bahiss, I., What is happening on the Afghanistan-Pakistan border?, accessed 5 January 2024, <https://www.crisisgroup.org/asia/south-asia/pakistan-afghanistan/pakistans-mass-deportation-afghans-poses-risks-regional-stability>.

¹⁰ UN OCHA, Reliefweb, Regional Refugee Response Plan for Afghanistan Situation 2023, p. 2.

¹¹ Curtis, J., Expulsion of Afghans from Pakistan and Iran, Research Briefing, House of Commons Library, 8 December 2023, Number 09905, accessed 12 January 2024, <https://commonslibrary.parliament.uk/research-briefings/cbp-9905/>, p. 4.

¹² O'Donnell, L., Why Pakistan Is Pushing Out Refugees, Foreign Policy, 13 November 2023, accessed 5 January 2024, <https://foreignpolicy.com/2023/11/13/pakistan-afghanistan-taliban-refugees-deportation/>.

undocumented in Pakistan, often without the necessary assets to support themselves and adding to the humanitarian crisis in their home country.¹³ The first phase of the Repatriation Plan focused on undocumented Afghan nationals and visa overstayers. In 2024, expulsion measures could be expanded to include Citizen Card and Proof of Registration card holders as well, potentially making another 2.2 million persons subject to expulsion measures.¹⁴ This year, a dire economic outlook, a tense security situation and continued implementation of the repatriation policy will affect both emigrants from Pakistan and vulnerable immigrant populations in the country. Income opportunities will be limited and the prospects for legal or tolerated stay of immigrants and refugees will diminish. The aforementioned factors increase the potential for primary and secondary movements from the country towards Türkiye and further European destinations. Thus, and in the face of a lack of legal channels, the vast majority of both Pakistani migrants and Afghans expelled from the country will have to rely on irregular patterns.

Iran

In recent years, Iran faced a continued trend towards increasing emigration of young and well-educated citizens in particular. Between 2020 and 2021, OECD countries recorded a 141% increase of Iranian immigrants, the number of Iranians studying abroad officially rose by 42.8% between 2013 and 2021 (from 49,000 to 70,000), and the number of asylum applications submitted by Iranian nationals globally rose by 44% between 2021 and 2022.¹⁵ In the EU, the number of Iranian applications grew by 33.8% in 2023, one of the highest relative increases observed during the year. The reasons for increasing emigration from Iran are both economic and political. The lasting effects of international sanctions in response to Iran's nuclear programme and soaring inflation worsened living conditions for broad sections of the population. The lack of development prospects, shrinking civil liberties and the authorities' clampdown on protests are considered to be the main factors in the trend towards emigration, which is very likely to continue this year as well.¹⁶

In 2024, however, the focus of attention will not be on the emigration of Iranians themselves, but, as in Pakistan, on the repatriation of Afghans from the country and the resulting secondary effects. Mainly due to the inflows of Afghan refugees in the wake of the Taliban takeover, Iran has become the second largest refugee hosting country in the world after Türkiye. According to official sources, 1 million Afghans have arrived in the country since 2021. Estimates speak of more than 3.4 million refugees and a total of 4.5 million displaced people of varying statuses on Iranian territory.¹⁷ As regards Afghan nationals residing in Iran, a 2022 government headcount identified a total of 2.6 million, including

¹³ UNHCR Regional Bureau for Asia and Pacific (RBAP), External Update: Afghanistan Situation #30, as of 1 December 2023, accessed 12 January, <https://data.unhcr.org/en/documents/details/105578>.

¹⁴ Bahiss, I., What is happening on the Afghanistan-Pakistan border?

¹⁵ Ghaffari, B., 'No hope for the future': Iran faces brain drain as emigration surges, Financial Times, 21 November 2023, accessed 3 January 2024, <https://www.ft.com/content/909e0958-54e6-42ec-b879-0fcfe49deb62>.

¹⁶ Ziabari, K., Iran's Brain Drain Accelerates as Crackdown on Dissent Intensifies, Stimson Center, 2 May 2023, accessed 3 January 2024, <https://www.stimson.org/2023/irans-brain-drain-accelerates-as-crackdown-on-dissent-intensifies/>.

¹⁷ UNHCR, Iran becomes the second largest refugee hosting country as forced displacement hits new record high globally, 14 June 2023, accessed 3 January 2024, <https://www.unhcr.org/ir/2023/06/14/iran-becomes-the-second-largest-refugee-hosting-country-as-forced-displacement-hits-new-record-high-globally/>.

750,000 refugee card holders, 360,000 resident permit holders, 267,000 family passport holders and 500,000 undocumented migrants.¹⁸ Like in Pakistan, a mix of economic difficulties, security concerns and waning support among the Iranian population for hosting large-scale foreign populations prompted the government to crack down on irregular immigration. Those participating in the headcount received a registration card and temporary exemption from deportation. However, with regard to those who did not register in the first place, the Iranian government announced that it had expelled up to 400,000 of this group in 2023 and intends to continue the policy this year as well.¹⁹ Moreover, as is the case in other major refugee hosting countries in the region, political and economic uncertainty yield a high potential for primary and secondary movements from Iran in 2024, the majority of which would head towards Türkiye and the EU.

Syria

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. In the EU too, Syrians were once more the number one applicant nation in 2023. In the first 10 months of the year, the Member States recorded a total of 133,693 applications submitted by Syrian nationals, equating to a 28.5% increase compared to the same period in 2022. The February 2023 earthquakes worsened the situation, affecting 8.8 million people and causing large-scale destruction of housing and infrastructure. Even before this, 15.3 million Syrians had needed humanitarian assistance, marking the highest number since the crisis began. Moreover, the impact of the earthquakes was not limited to Syria alone. In Türkiye, they mainly hit areas and regions where Syrian refugees live in high numbers. The Syrian 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.²⁰ 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-Gaza conflict that has already started, with Israeli airstrikes hitting Aleppo and Damascus airports, and disrupting vital humanitarian services.²¹ 85% of all Syrian refugees are hosted

¹⁸ UNHCR, Overview of Iran Operation, last updated 30 November 2023, accessed 3 January 2024, <https://data.unhcr.org/en/country/irn>.

¹⁹ Curtis, J., Expulsion of Afghans from Pakistan and Iran, p. 10.

²⁰ Potkanski-Palka, M., Syria. Socio-Economic Survey 2023, Dossier, Country of Origin Information Unit (Staatendokumentation), Austrian Federal Office for Immigration and Asylum.

²¹ UN Security Council, Briefing on the political and humanitarian situation in Syria, S/PV.9459, 30 October 2023.

in neighbouring countries. The major host countries in the region (Türkiye 3.3 million, Lebanon 790,000, Jordan 651,000, Iraq 272,000 and Egypt 152,000)²² themselves face serious challenges in economic terms 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.²³ 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 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 UNRWA's most recent situation report, up to 1.9 million people, or 85% of the population, have been displaced across the Gaza Strip since Israel started its retaliatory operations against Hamas in October 2023. At the beginning of 2024, a total of 1.88 million IDPs received assistance from UNRWA (the United Nations Relief and Works Agency for Palestine Refugees in the Near East). 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".²⁴ The humanitarian situation is described as "catastrophic" and worsening. 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.²⁵ Even if the violence were to stop immediately, 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 1948.²⁶ The descendants of the Palestinians displaced during the founding of the Israeli State in subsequent conflicts number almost

²² UNHCR, Operational Data Portal, Syria Regional Refugee Response, accessed 3 January 2024, <https://data.unhcr.org/>.

²³ MPI (Migration Policy Institute), Top 10 Migration Issues of 2023, accessed 28 December 2023, <https://www.migrationpolicy.org/programs/migration-information-source/top-10-migration-issues-2023>.

²⁴ UNRWA, UNRWA Situation Report #61 on the situation in the Gaza Strip and the West Bank, including East Jerusalem. Information from 4–6 January 2024, valid as of 6 January 22:30 (local time), Days 90–92 of Hostilities, published 7 January 2024, accessed 9 January 2024, <https://www.unrwa.org/resources/reports/unrwa-situation-report-61-situation-gaza-strip-and-west-bank-including-east-jerusalem>.

²⁵ IPC Global Initiative, Gaza Strip: IPC Acute Food Insecurity, November 2023 – February 2024, accessed 10 January 2024, https://www.ipcinfo.org/fileadmin/user_upload/ipcinfo/docs/IPC_Gaza_Acute_Food_Insecurity_Nov2023_Feb2024.pdf.

²⁶ Perry, T. and Lubell, M., Why Palestinian displacement in Gaza war alarms the UN and Arabs, Reuters, accessed 28 December 2023, <https://www.reuters.com/world/middle-east/why-palestinian-displacement-gaza-war-alarms-un-arabs-2023-12-11/#:~:text=Many%20were%20driven%20out%20or,Some%20went%20to%20Gaza>.

6 million.²⁷ 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 have been reluctant to open their borders to the large numbers of displaced Palestinians and have communicated clearly that they do not intend to do so in the future. At the time of writing, most actors are in favour of keeping the displaced population in Gaza, offering protection and humanitarian aid on-site, actively involving them in the reconstruction of and engaging them in the formation of a “two-state solution” advocated for by key stakeholders like the USA and the EU.

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 travelling along this route. 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 Storm Daniel’s impact, causing significant casualties and displacing over 43,000 people. The fallout from the disaster and a challenging economic situation disproportionately affected the more than 700,000 migrants in the country, out of whom almost 90% stated in an IOM survey that they had come to the country in search of employment and earning opportunities they did not find in their home countries.²⁸ Thus far, the comparatively positive economic outlook after the resumption of oil production in 2022 has not yet led to an improvement of many migrants’ economic situations in Libya. According to the IOM, one in four migrants reported being out of work and unemployment rates among migrants appear to be higher than before the Covid-19 pandemic.

Economic hardships also contributed to a phenomenon that had a greater impact on migration trends along the Mediterranean routes than had been observed in the past. 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 stepped-up expulsion policies geared at irregular immigrants. Libya is a major partner for the EU in the area of migration management and curbing irregular crossings. Last year, Libyan authorities reported 11,465 people apprehended and returned, marking a significant increase compared to 2022. Libya will remain

²⁷ Culbertson, S., Displaced in Gaza: The Least-Bad Option, Commentary (Los Angeles Times), 4 December 2023, accessed 28 December 2023, <https://www.rand.org/pubs/commentary/2023/12/displaced-in-gaza-the-least-bad-option.html>.

²⁸ IOM DTM, IOM Libya Migrant Report Round 46, January – February 2023.

a key partner in 2024 too, despite the criticism of the Libyan authorities' actions with regard to human rights violations and alleged illegal pullbacks of boats heading to Europe.²⁹ A sustainable reduction in irregular crossings and prevention of deaths across the Mediterranean – IOM recorded 2,346 missing migrants in the Central Mediterranean in 2023³⁰ – will not be achieved through control measures alone. To achieve this, European countries, Libya and countries of origin will have to find joint solutions that also place the needs and interests of the migrants themselves at the centre of measures.

Algeria, Egypt, Morocco and Tunisia

In 2023, the trend of increasing crossings continued along the Central Mediterranean Route. Including November, their number increased by a further 61% in comparison to 2022. What changed, however, was the composition of irregular arrivals in terms of the nationalities apprehended. 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 (the Western African Route recorded an increase of 112% in 2023) but also of enhanced cooperation between North African countries and the EU on migration control. The most prominent example was the memorandum of understanding (MoU) agreed by the EU and Tunisia in July, encompassing financial and technical assistance, collaboration on search and rescue operations, enhanced border management and the disruption of smuggling organisations in Tunisia. Moreover, the MoU was intended to facilitate the return and readmission of Tunisians staying illegally in the EU, as well as expanded pathways for regular migration and seasonal work.³¹

Despite the controversy that followed the signing of the agreement regarding the modalities of its implementation, the joint commitment to migration control and the return of illegally staying migrants seem to have had an effect on migration dynamics. The increase of detections along the Central Mediterranean Route can be largely 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%. For the first time in years, two sub-Saharan African countries ranked among the three most important nationalities apprehended on the Central Mediterranean Route: Guinea with 16,132 and Côte d'Ivoire with 14,580 apprehensions. 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 and increasingly negative anti-immigrant attitudes among sections of the population led to a series of hostilities directed against foreign populations, but also to a significant increase in the authorities' enforcement of expulsions and repatriations of nationals from sub-Saharan countries of origin. In order to escape the increasing social

²⁹ Mixed Migration Centre (MMC), Quarterly Mixed Migration Update: North Africa, Quarter 3 2023, accessed 12 January 2024, <https://mixedmigration.org/wp-content/uploads/2023/10/QMMU-Q3-2023-North-Africa.pdf>, p. 6.

³⁰ IOM, Missing Migrants Project, accessed 3 January 2024, <https://missingmigrants.iom.int/>.

³¹ Mixed Migration Centre (MMC), Quarterly Mixed Migration Update: North Africa, Quarter 3 2023, p. 9.

and political pressure, which was also felt by migrants who had stayed in Tunisia, Algeria and Morocco for some time already, and in order to avoid an involuntary return to the dire conditions in their home countries, many of them decided to leave for Europe instead. In 2024, the EU will have to respond to a scenario that is not entirely unknown but is perhaps new in its dimensions and effects. Neighbouring countries, which for their part want to reduce the number of irregular migrants on their territory, will continue to pursue increasingly strict repatriation policies towards migrant populations informally residing on their territories. As a consequence, it is quite likely that only some of the migrants concerned will return home this year, while many others will try to make the dangerous and expensive journey across the Mediterranean to reach the European mainland. 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 will continue to increase in 2024 by way of secondary flows. Again, European and North African partners must discuss joint and durable solutions to address both repatriation and secondary movements of migrant populations that might be subject to expulsion and repatriation from their current countries of residence in the Southern Mediterranean.

African countries

According to the Africa Center for Strategic Studies, the total number of displaced persons in African countries stood at 40 million in 2023, an increase of 13% since 2022 and 23% since 2021, equating to a rise of more than 7 million persons.³² Globally, 35% of all internally or externally displaced persons originate from an African country. More than 77% of them are displaced inside their home country, 19% are hosted in the neighbourhood and 6% have sought asylum further afield. Thus, the number of Africans displaced has more than tripled over the last decade, and the continent hosts three quarters of all new internal displacements globally. Notwithstanding the trend towards increasing displacement, African migration also encompasses large labour migration flows. According to recent IOM estimates, more than 21 million African nationals have moved abroad in order to obtain employment. Displacement itself is driven by a complex interplay of factors, including armed conflict and violence both at the internal and interstate level, political instability, religiously motivated violence, military coups, economic hardship, lack of prospects for the younger populations, environmental factors, humanitarian crises and natural disasters, limited civil liberties and human rights violations. Last year, there were more than 20 displacement situations in Africa, many of them protracted over long time periods and simultaneously including inflows and outflows of refugees but also involving large-scale internal displacement.³³

Since 2021, the situation has been aggravated further by a series of military coups in Burkina Faso, Mali, Guinea, Niger, Gabon and Chad, which brought an end to the comparatively stable period

³² Africa Center for Strategic Studies, African Conflicts Displace Over 40 Million People, 22 August 2023, accessed 2 January 2024, <https://africacenter.org/wp-content/uploads/2023/10/African-Conflicts-Displace-Over-40-Million-People.pdf>.

³³ Sudan hosts 7.3 million displaced people (6 million IDPs and 1.3 million refugees, numbers rounded), DRC 7.1 million (6.1 million IDPs and 1.0 million refugees), Somalia 5.1 million (4.4 million IDPs and 700,000 refugees), South Sudan 4.6 million (2.2 million IDPs and 2.4 million refugees), Nigeria 4.0 million (3.6 million IDPs and 400,000 refugees), Ethiopia 3.4 million (3.1 million IDPs and 300,000 refugees), Burkina Faso 2.1 million (2.06 million IDPs and 80,000 refugees), CAR 1.3 million (500,000 IDPs and 800,000 refugees), Cameroon 1.3 million (1.1 million IDPs and 200,000 refugees) and Mozambique 840,000 (830,000 IDPs and 10,000 refugees).

between 2010 and 2019. The recent wave in coups is seen as rooted in the key drivers of “acute crisis”, entrenched socio-economic challenges, politicised armed forces and “self-reinforcing political dynamics”.³⁴ It is, however, also seen as connected to geopolitical developments, namely Russia’s engagement in the region and the decline of Western – and European – influence. The recent regime changes and geopolitical shifts can be expected to affect migration flows between Africa and Europe in 2024, but also to define the scope for political cooperation between the two continents on migration issues. Niger can serve as a good example for such a prediction. The future of Niger’s external relationships, including cooperation with the EU on migration control and the continuation of the bloc’s financial assistance for what it deems an unconstitutional government, is uncertain following the coup. The EU, Niger and its neighbours have a vital interest in maintaining cooperation on migration issues but will have to devise a new overarching strategy and course of action,³⁵ which take into account changed realities and carefully weigh migration policy interests against European values and principles. In terms of the migration situation as such, it needs to be emphasised that last year too, African migration and displacement were largely regional and only a small fraction of African migrants and displaced persons embarked on a journey towards Europe. This also related to irregular arrivals and asylum applications; however, not least because of growing instability in several African regions, their numbers grew in comparison to 2022. Between January and September 2023, asylum seekers from 50 sub-Saharan African countries submitted a total of 130,270 applications in EU Member States, representing a 27.5% increase compared to 2022. However, the share of sub-Saharan nationals among all applicants was only 16.2% and their total number equalled the number of Syrian applications alone. Moreover, a considerable proportion of the increase is attributed to secondary movements of sub-Saharan migrants facing increasingly hostile environments in North African countries. Thus, there was also no distinct trend that flows from countries that had experienced a coup would have increased significantly more than flows from others. In the African context, flight and irregular migration appear to have a number of causes, of which the respective government is only one. The factors driving African migration will retain their significance in 2024 and are likely to result in further increases in arrivals and applications, but will not necessarily translate into big numbers in European apprehension and asylum statistics.

Latin and Central American countries

According to UNHCR there were more than 21 million people displaced across Latin America and the Caribbean in 2022, the highest ever recorded number and an increase of 25% compared to the previous year. In 2024, UNHCR expects the region’s displaced and stateless population to reach 25 million, a figure twice as high as five years ago.³⁶ The dramatic scale of displacement is caused by protracted crisis situations in a number of Latin American countries, which overlap and reinforce each

³⁴ Basedau, M., Coups in Africa – Why They Happen, and What Can (Not) Be Done about Them, Blog Joint Futures 05, 28 September 2023, accessed 2 January 2024, <https://www.swp-berlin.org/publikation/mta-joint-futures-05-coups-in-africa>.

³⁵ Bisong, A., Jegen, L. and Mounkaila, H., What does the regime change in Niger mean for migration cooperation with the EU?, ecdpm – The Centre for Africa-EU relations, Briefing Note No. 168, 11 September 2023, accessed 12 January 2024, <https://ecdpm.org/work/what-does-regime-change-niger-mean-migration-cooperation-eu>, p. 11.

³⁶ UNHCR, Global Focus, The Americas, accessed 2 January 2024, <https://reporting.unhcr.org/operational/regions/americas>.

other. Driven by violence, economic hardship, insecurity, inequality and human rights violations, ever growing populations are forced to leave their homes in search of a safe haven or the opportunity to sustain themselves and their families. The displaced population includes more than 7.2 million refugees and migrants from Venezuela, over 7.4 million internally displaced persons (IDPs) in Colombia, El Salvador, Honduras and Mexico, and more than 920,000 asylum seekers and refugees from Nicaragua, El Salvador, Honduras and Guatemala.³⁷ The overwhelming majority of displaced persons are hosted internally or by countries in the region. Colombia, despite the huge number of IDPs, hosts 2.5 million refugees and others in need of international protection from Venezuela, but also has to provide support to more than half a million Colombians who have returned from Venezuela in recent years.³⁸ In Costa Rica, a country with a population of 5.2 million, over 240,000 asylum seekers from the region are waiting for a resolution of their cases. Naturally, host countries struggle to organise registration, provide shelter and accommodation, and ensure access to vital healthcare services for the huge numbers they have to deal with, let alone offer long-term solutions for sustainable protection and socio-economic integration.

The lack of viable options in some hosting countries drives many to move onward in search of a more stable future. Flows within and between host countries in the region have grown again in 2023, as have northbound movements towards the USA. Between January and September 2023, more than 400,000 people crossed the Darien Gap linking North and South America, an almost threefold increase compared to the same period in 2022. With a total of 2.48 million encounters at the south-west border, the USA recorded another peak in arrivals of migrants last year. The figure was 4.2% higher than in 2022; however, it confirmed a clear trend of a “flattening curve” compared to the 2021/2022 period when the number of arrivals had increased by 37.8%.³⁹ In 2023, the situation at the US border was shaped by the lifting of Covid-related emergency and containment measures, which had impacted rules on immigration and application for international protection as well, and the introduction of a new rule allowing asylum seekers to make their request by scheduling an appointment at a dedicated port of entry through an online app, and establishing a presumption of ineligibility for asylum for those who try to cross between ports of entry. The new policy also included a – limited – opening of legal pathways, employment-based visas and a sponsorship programme for Cubans, Haitians, Nicaraguans and Venezuelans. Mirroring the European debate on asylum offshoring, there are also plans to open regional processing centres in Latin and Central American countries to provide humanitarian protection as well as information on legal pathways. As in Europe, migration will play a central role in the upcoming US presidential election. This will increase the pressure on the Biden administration to deliver on reducing the number of irregular entries. At the same time, and in anticipation of an even more restrictive entry policy throughout the year and following the autumn presidential election, many migrants and refugees from Latin America will try to reach the USA before the expected tightening of

³⁷ UNHCR, Critical Needs in the Americas, August 2023, accessed 2 January 2024, <https://data.unhcr.org/en/documents/details/102903>, p. 1.

³⁸ UNHCR, Global Focus, Situations, accessed 2 January 2024, <https://reporting.unhcr.org/operational/situations>.

³⁹ U.S. Customs and Borders Protection, Nationwide Encounters, last modified 22 December 2023, accessed 2 January 2024, <https://www.cbp.gov/newsroom/stats/nationwide-encounters>.

entry conditions materialises. The pressure on countries such as Mexico, where hundreds of thousands are already waiting for their interview with the US authorities or looking for other ways to cross the border, is likely to increase further in 2024.

In the EU, the number of asylum seekers from Latin American countries of origin has consistently grown over the last few years and 2023 was no exception in this regard. Between January and September 2023 their number grew by 35.8% compared to the same period of last year (from a total of 98,360 to 133,550 applications). This growth was clearly above the general trend of an increase of 21.9% in the total number of applications received by EU Member States in the first nine months of 2023. In view of the rapidly growing displacement crisis in Latin America, the expected further tightening of US policies and the fact that Latin American nationals can enter the EU without a visa, it can be expected that the trend towards high or even rising application rates will continue in 2024 as well.

Ukraine

The Ukrainian refugee crisis is the largest refugee crisis in Europe since the end of the Second World War. Since the beginning of Russia's aggression in February 2022, nearly one third of the population has been displaced either internally or across borders. According to the UNHCR, there are 6.3 million Ukrainian refugees recorded globally, 5.9 million in Europe and 4.3 million in the Member States of the EU. The vast majority of Ukrainian refugees want to return but this is often prevented by security concerns, damaged or destroyed housing, and a lack of access to basic supplies and services. Notwithstanding this, available figures also confirm return and pendulum migration. Last year, EU Member States granted temporary protection to approx. 934,000 additional cases while the overall number of beneficiaries remained almost the same, suggesting a considerable size of flows from and to Ukraine.⁴⁰ An estimated 400,000 persons have returned, albeit to locations where almost half of the residences are damaged or destroyed. The need for humanitarian assistance will remain high in 2024, with some 14.6 million people in the region expected to require multisectoral humanitarian support throughout the year.⁴¹ Ukraine's economy is expected to grow by 3.5% in 2023 after contracting by almost 30% in 2022, thanks to stabilised infrastructure, a better harvest, rerouting of exports, government spending and international donor support. Modest recovery, however, will not be sufficient to create much economic opportunity for the Ukrainian population and largely depends on continued Western support. On the battlefield, analysts do not expect a decisive breakthrough for either side but see ebbing Western support, a shift in battlefield initiative and Russia's material advantage as main factors for the development of the conflict in 2024.⁴² In terms of displacement and

⁴⁰ Eurostat, Beneficiaries of temporary protection at the end of the month by citizenship, age and sex – monthly data [migr_asytspm\$defaultview], accessed 4 January 2024, <https://ec.europa.eu/eurostat/data/database>.

⁴¹ UNHCR, Global Focus, Ukraine situation, accessed 10 January 2024, <https://reporting.unhcr.org/operational/situations/ukraine-situation>.

⁴² Eurasia Group, Top Risks for 2024, accessed 8 January 2024, https://www.eurasiagroup.net/issues/Top-Risks-2024?utm_source=GZERO+Media&utm_campaign=0164f7c5df-EMAIL_CAMPAIGN_2022_06_27_02_54_COPY_01&utm_medium=email&utm_term=0_e605619869-0164f7c5df-170975081.

migration scenarios, the situation has not significantly changed since last year. As stated in the Migration Outlook 2023, because of severe destruction, damaged critical infrastructure and enormous economic and humanitarian challenges, another large-scale outflow of refugees cannot be ruled out for 2024, notwithstanding the remarkable resilience displayed by the Ukrainian people. In response to the protracted situation and in order to provide certainty for the Ukrainian beneficiaries currently living in the EU, the Council agreed to extend the duration of temporary protection in the EU until 4 March 2025. This decision creates more favourable conditions for (temporary) integration and economic participation but does not answer the question if and when the millions of Ukrainian refugees can or will return home and what their role in the recovery of their home country should be.

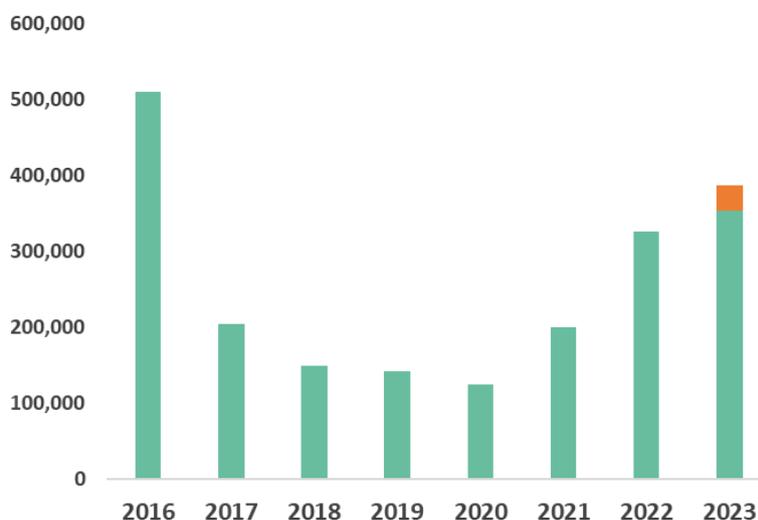
Migration trends in the EU

Two major developments shaped the European migration debate in 2023: the war in Ukraine followed by the largest inflow of refugees since the end of the Second World War and the increasing numbers of irregular arrivals and asylum applications by nationals from other world regions. Two sets of indicators provide information about related developments: the detections of irregular border crossings and the total numbers of asylum applications submitted in the EU.

Detections of irregular border crossings

Between January and November 2023, Frontex registered a total of 354,713 irregular crossings at the external borders of the EU.⁴³ This figure corresponded to an increase of 21.6% in comparison to the first 11 months of 2022 and an increase of 108.9% in comparison to the January to November period in 2021. Based on these trends, the end-of-year figure is expected to be approx. 380,000 apprehensions (an estimated increase of 16.5% compared to 2023), the highest number since 2016 but still clearly below the figures recorded during the height of the “refugee crisis” (1.3 million in 2015 and 511,000 in 2016).

Detections of illegal border crossings in the EU 2016 - 2023 (estimate)



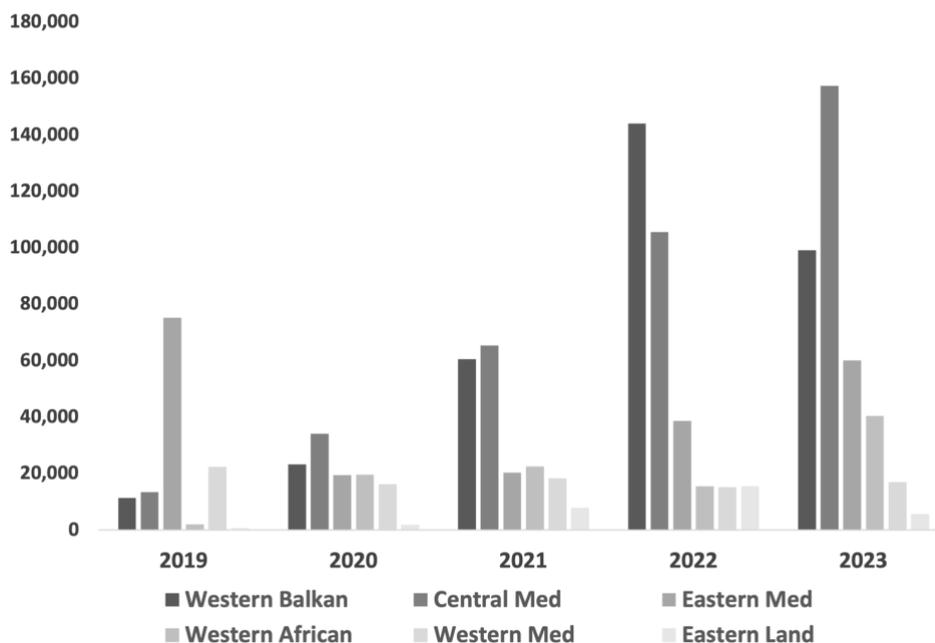
Source: Frontex

The observed overall increase did not affect the main migration routes in similar ways. In line with previous trends, detections continued to concentrate on the Central Mediterranean Route and the Western Balkans Route. Taken together, these two routes recorded 67.6% of all detections in 2023. However, they switched their position as the most important route for irregular migration to the EU.

⁴³ Frontex, Detections of irregular border-crossings statistics, preliminary figures January 2022 – November 2023, accessed 2 January 2024, <https://frontex.europa.eu/we-know/migratory-map/>.

With a preliminary figure of 157,479 apprehensions (up 49.2%),⁴⁴ the Central Mediterranean Route observed the highest number of irregular arrivals since 2016 and the highest number among all routes in 2023. This development can be mainly attributed to both primary and secondary movements of nationals from sub-Saharan countries. Political destabilisation continued to increase and led to a significant upsurge in displacement but also to a further deterioration in the living conditions of broad sections of the population, prompting outward migration towards Europe. In addition, a tense economic situation and increasing migration pressures led North African governments to adopt an increasingly strict stance towards the resident migrant populations, who mainly originate from Southern Africa. Expulsions from Algeria and Tunisia to the south and an increasingly hostile climate prompted many migrants to attempt the dangerous journey across the Mediterranean. Taken together, the share of nationals from West and Central African countries among all arrivals on the Central Mediterranean Route increased from approx. 5% in 2022 to approx. 40% in 2023.⁴⁵ At the same time, many irregular migrants and refugees from other regions (Bangladesh, Syria, Pakistan) also tried to reach Europe via the Mediterranean route. In contrast, the Western Balkans Route recorded a significant decline in the number of apprehensions, not least due to Serbia's stricter visa policy towards important countries of origin of irregular migrants and asylum seekers, such as Burundi (down 92.4%), India (down 93.0%) and Tunisia (down 37.5%).

Detections at main migratory routes 2019 - 2023



Source: Frontex

⁴⁴ On 4 January 2024, Italy reported a total of 157,652 arrivals for the whole of 2023, a 50% increase compared to 2022.

⁴⁵ Mixed Migration Centre (MMC), Quarterly Mixed Migration Update: West Africa, Quarter 3 2023, accessed 12 January 2024, <https://mixedmigration.org/wp-content/uploads/2023/10/QMMU-Q3-2023-West-Africa.pdf>, p. 6.

Between January and December 2023, the Central Mediterranean Route recorded a total of 157,479 cases (up 49.2% compared to 2022), the Western Balkans Route a total of 99,068 cases (down 31.3%), the Eastern Mediterranean Route a total of 60,073 cases (up 55.3%), the Western African Route a total of 40,403 cases (up 161.3%), the Western Mediterranean Route a total of 16,915 cases (up 11.8%) and the Eastern Border Route a total of 5,608 cases (down 63.7%).

As in previous years, the migrants and refugees apprehended on the different routes formed a highly heterogeneous group. In 2023 too, they differed in terms of motivation, strategies and migration patterns; geographic origin and distance to overcome; access to means of transportation; availability of funds to organise their journey; use of people-smuggling networks; and exposure to entry and border control regimes. Generalisations are therefore difficult to make. Available data and analysis show some noteworthy developments, however.

As in previous years, there was a clear correlation between instability and violent conflict in a particular country and the number of citizens of that country apprehended crossing a Schengen border irregularly. With a total of 96,315 cases, Syria was by far the most important country of origin for irregular arrivals in the first 10 months of 2023. Almost 28% of all apprehensions recorded last year related to citizens of the civil war-torn country. Many of the other apprehended migrants, albeit in significantly lower overall numbers than Syrians, also originated from the crisis regions in the wider neighbourhood: Guinea (5.4%), Afghanistan (4.7%), Burkina Faso (2.2%), Palestine (1.7%) and Iraq (1.5%). The number of apprehended Palestinians almost doubled last year. Remarkably, there was already a sharp increase in detections of irregular crossings during July, more than two months before the Hamas attack on Israel, suggesting that refugee flows already start to emerge in advance or anticipation of a violent conflict and could therefore be regarded as an early indicator of expected political escalations.

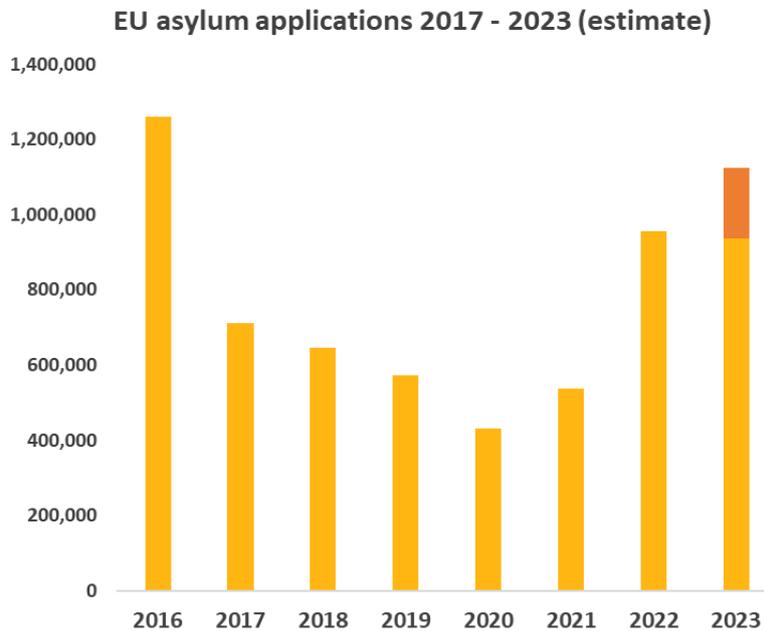
The continuing destabilisation of the Sahel can be seen as one reason for the observed increases in apprehensions of nationals from sub-Saharan countries of origin, the increasingly restrictive attitude of North African governments towards migrant populations on their territories as the other. Thus, it can be assumed that both primary and secondary migration of the affected migrant groups increased last year and led to strong relative increases in the number of apprehensions. Nationals from Guinea accounted for 13,780 apprehensions (up 323.7% compared to the first 10 months of 2022), Côte d'Ivoire 15,891 (up 270.4%), Burkina Faso 7,469 (up 1,946.3%) and Mali 6,367 (up 334.3%). Niger and Sudan also showed strong relative increases but were less significant in absolute numbers.

By contrast, figures related to nationals from North African countries showed a clear downward trend in 2023. The number of apprehended Egyptian nationals decreased by 43.3% (10,593 cases in total, 8,085 cases less than in 2022), of Algerian nationals by 40.0% (4,920 cases, 3,275 less than in 2022), of Tunisian nationals by 37.5% (14,679 cases, 8,815 less than in 2022) and of Moroccan nationals by 6.1% (12,840 cases, 781 less than in 2022). This development can be attributed to enhanced cooperation on migration control between North African governments and the EU but also on the introduction of visa requirements for citizens from these countries. Last year, following the abolishment of visa-free entry

to Serbia, the number of Tunisian nationals apprehended along the Western Balkans Route fell by 99.3% compared to 2022, from 6,597 to 44 cases. Similar to citizens from Tunisia and Türkiye, Indian nationals did not require a visa to enter Serbia throughout 2022 and used the country as a stepping stone for onward attempts to enter the EU without the necessary permits. Following the abolishment of visa-free entry to Serbia, apprehensions of Indian nationals went down by 95.0% from 5,567 cases to 290. This development shows that visa policies can be an effective means of curbing irregular migration, at least if there is no acute displacement situation, political cooperation is sought with the countries of origin and, as in the case of the countries of origin mentioned, joint efforts are made to develop pathways for legal migration.

Asylum applications in 2023

In the first 10 months of 2023, a preliminary total of 927,030 asylum applications⁴⁶ were submitted in Member States of the European Union. This represents a 21.3% increase in comparison to the first 10 months of 2022 (764,050 applications in total) and the highest number since 2016 (1.26 million).⁴⁷ The figure is in line with the trend of recent years, where aggravating crises in the European neighbourhood, economic imbalances and the lifting of mobility restrictions imposed in the wake of the global pandemic had resulted in a steady rise in application figures. The numbers below refer to the most recent country statistics available at the time of writing and allow for the depiction of several general trends. A final assessment of asylum migration in 2023 will, however, not be possible until final EU application statistics are available in March 2024.



Source: Eurostat

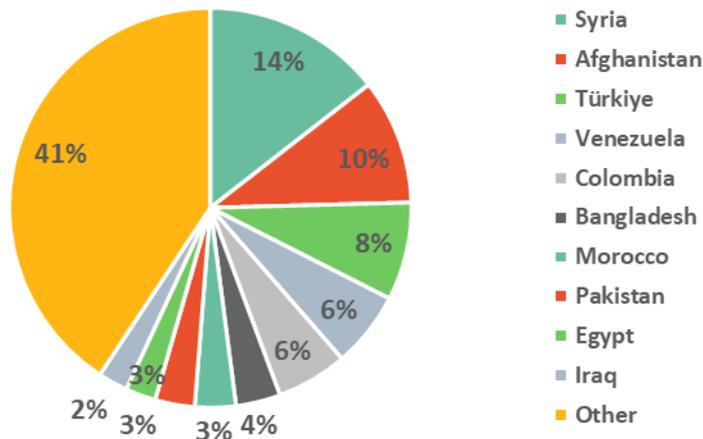
The largest applicant groups of 2022 (Syria, Afghanistan, Venezuela, Türkiye, Colombia, Pakistan and Bangladesh) accounted for the most applications in 2023 as well. However, the figures for the respective nationalities showed different trends. Syria remained the most important country of origin of asylum seekers in the EU. Applications submitted by Syrian nationals increased by 28.5% from 104,035 to 136,693 and represented 14.4% of all applications. Notably, applications from Afghanistan went against the generally rising trends and decreased by 5.6% from a total of 99,630 in 2022 to a total of 94,034 in 2023. Syria and Afghanistan led the overall ranking, followed by Türkiye (a total of 73,450

⁴⁶ Eurostat, Asylum applicants by citizenship, age and sex – monthly data (January 2022 – October 2023), accessed 2 January 2024, <https://ec.europa.eu/eurostat/data/database>; EUAA (European Union Agency for Asylum), Key figures on international protection in EU+ countries (1 December 2023), accessed 2 January 2024, <https://euaa.europa.eu/key-figures-international-protection-in-EU>.

⁴⁷ Eurostat, Asylum applicants by citizenship, age and sex – monthly data (January 2019 – October 2023).

applications, up 99.3%), Venezuela (56,730 applications, up 34.8%), Colombia (53,105 applications, up 52.9%), Bangladesh (33,287 applications, up 26.5%), Morocco (30,441 applications, up 90.1%), Pakistan (29,494 applications, down 5.1%), Egypt (22,619 applications, up 87.3%) and Iraq (24,717 applications, down 2.4%). The asylum statistics also reflected the trend of increasing irregular arrivals from nationals of Southern African countries. Ranked according to total numbers, applications from Guinea increased by 87.3% (9,160 to 17,159), from Côte d'Ivoire by 127.5% (7,420 to 16,878), from Somalia by 10.5% (14,680 to 16,221), from Sudan by 71.4% (4,660 to 7,998), from Mali by 19.1% (4,845 to 5,771) and from Burkina Faso by 407.5% (960 to 4,872). This notwithstanding, no Southern African country of origin was among the top 10 most important applicant countries. Guinea ranked 13th in this list. Latin American countries of origin continued to be more relevant. With 56,730 applications in total, Venezuela was the 4th most important country of origin of asylum seekers in the EU (up 34.8% compared to 2022), Colombia ranked 5th (53,105 applications, up 52.9%) and Peru ranked 12th (19,425 applications, up 87.3%).

Main countries of origin of asylum seekers in the EU 2023

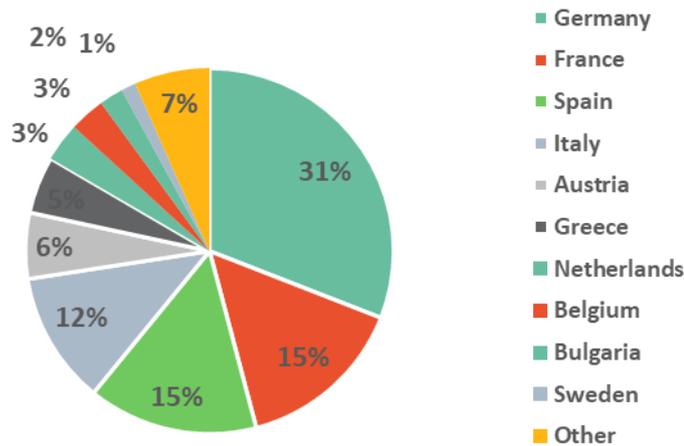


Source: Eurostat

As in previous years, applications concentrated on a minority of Member States, with 93.4% of all asylum applications submitted in 10 EU Member States: Germany (a total of 284,380 applications or 30.6% of all applications submitted in the EU), France (137,500 applications or 14.8%), Spain (137,315 applications or 14.8%), Italy (110,634 applications or 11.9%), Austria (53,615 applications or 5.8%), Greece (46,429 applications or 5.0%), Netherlands (31,410 applications or 3.4%), Belgium (28,735 applications or 3.1%), Bulgaria (19,393 applications or 2.1%) and Sweden (11,715 applications or 1.3%). As in previous years, asylum applications disproportionately affected those EU Member States that were either first countries of entry along the Western Balkans and Central Mediterranean Routes and/or intended final destinations of asylum seekers in the EU. Germany witnessed another significant increase in applications (up 55.6%), as did the other major receiving Member States of France

(up 9.8%), Spain (up 40.9%), Italy (up 62.1%) and Greece (up 65.5%). At the same time, a majority of 15 Member States recorded declines in the number of applications. In Austria figures went down by 42.5% and the country recorded almost 40,000 applications less than in 2022.

**Main countries of destination of asylum seekers in the EU
Oct 2023**



Source: Eurostat

An outlook for 2024 has to take into account both the heterogeneity of flows and the opportunity structures along the migratory routes. Violent conflict, political instability and worsening economic conditions in many regions of origin or current residence of migrants suggest that the number of displaced persons and the need for millions of people to reach a safe country that provides protection, safety and economic perspectives will not diminish. Against this backdrop, there are no real grounds for assuming that migration pressures towards Europe will decrease in 2024. The number of asylum applications might well reach 1 million or more again this year.

As in previous years, however, their actual volume will also depend on the level of cooperation with countries of origin and transit, the efficacy of migration management systems and the impact of policy changes. Last year's agreement on the New Pact on Migration and Asylum included a number of new rules that are designed to reduce irregular migration and the number of asylum applications in the EU. There is, however, a two-year period for transposition into national law, meaning that the outcome of the pact will not yet show in this year's statistics. Reinforced cooperation with neighbouring countries and Member State initiatives related to external processing of asylum claims might already have an impact in 2024 but it remains to be seen how strong the effects will be.

Visa policy is another lever to influence arrivals and applications. Last year, following the abolishment of visa-free entry to Serbia, the number of arrivals of asylum applicants from a number of origin countries with low prospects of obtaining a protection status decreased significantly in comparison to 2022. This observation suggests that visa policies can be an effective means of curbing irregular

migration, at least if there is no acute displacement situation, and political cooperation is sought with countries of origin and transit. Certainly, visa regulations must not result in cutting off people in need of protection from access to asylum procedures or in hurting States' interests in relation to mobility, migration and economic cooperation with their respective partners. In view of the high level of attention paid to asylum application numbers in the political debate, it is still worth reviewing existing regimes against their impact on the annual statistics. In October, the European Commission proposed a renewed Visa Suspension Mechanism that should allow for quicker responses in the case of instrumentalisation, hybrid threats and increased irregular arrivals due to a lack of alignment with the EU's visa policy.⁴⁸ In the past, the preservation of bilateral economic and political relations often took priority over migration control interests and made visa suspension a weak instrument, which was rarely used in connection with important non-EU partners. In view of the more than 1 million asylum applications in 2023 and the pivotal role migration will play in this year's elections, this premise might change in 2024.

The intertwining of geopolitics and migration

The war in Ukraine and the Israel-Gaza crisis may be the most recent manifestations of this development but are only the culmination of a trend that started more than 10 years ago. Since then, the world has transitioned from a two-decades-long period of relative stability after the fall of the Iron Curtain to a period of increasing volatility and disruption. The global environment has become more competitive and less secure, the world's great powers have entered into systemic rivalry, and a "polynodal" international order has emerged that is characterised by greater state fragility, an increasing number of violent conflicts, terrorism, hybrid threats, economic crises, weaponisation of energy, food insecurity and climate change.⁴⁹ The simultaneous and mutually reinforcing occurrence of these factors also results in increasing levels of human mobility, voluntary and forced, a trend that is almost certain to continue in 2024 and beyond. Currently, there are 281 million international migrants, representing 3.6% of the world's population. Their number has grown by 84% over the last 30 years. 169 million persons are considered migrant workers, bringing invaluable skills and resources to the economies of their host countries, but also sending billions of euros back home to support their families and home countries. However, the trend towards increasing geopolitical volatility has resulted in a disproportional growth of forced mobility. While the number of international migrants grew by 84% between 1990 and 2020, the number of displaced persons, both internally and across borders, increased by a staggering 400%.

Notwithstanding the complex and multifaceted nature of migration, state fragility and violent conflict are of paramount importance for long-term migration trends, also in the European context. According

⁴⁸ European Commission, Proposal for a Regulation of the European Parliament and of the Council amending Regulation (EU) 2018/1806 as regards the revision of the suspension mechanism, Brussels, 18 October 2023, COM (2023) 642 final, accessed 12 January 2024, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM%3A2023%3A642%3AFIN>.

⁴⁹ Hofmann, M., The Future of International Migration: what we know about the drivers that shape long-term migration trends and require policy responses, Prague Process, November 2023, accessed 30 December 2023, <https://www.pragueprocess.eu/en/news-events/news/790-the-future-of-international-migration-what-we-know-about-the-drivers-that-shape-long-term-migration-trends-and-require-policy-responses>, p. 1.

to the Stockholm International Peace Institute (SIPRI), the number of state-based armed conflicts almost doubled between 2010 and 2022, correlating to a doubling of the number of forcibly displaced persons over the same period.⁵⁰ Due to Russia's aggression against Ukraine, this number reached an estimated 114 million in 2023.⁵¹ Thus, there are reasons to assume that geopolitics and migration will be closely intertwined in 2024 as well.

First, there is conflict-induced displacement as an indirect consequence of military operations or the result of deliberate aggression targeting specific populations. The majority of displaced persons stay on the territory of their home country or find protection in neighbouring countries, but a considerable share will seek refuge further afield and try to reach a safe country in Europe. At present, there is little reason to believe that violence-induced migration will diminish. Since 2020, the outbreak of war in Tigray, a series of military coups in African countries, the Taliban takeover in Afghanistan, the Russian aggression against Ukraine and the renewed deterioration of the security situation in Syria have caused new highs in the number of globally displaced persons. At the time of writing, Hamas' terrorist attack and Israel's military response have displaced nearly 2 million people, almost the whole population of Gaza; in the months to come, many of them will have to try to move to a safe place in the neighbourhood or in Europe.

A second link between geopolitics and migration is the "instrumentalisation" of the latter. Last year's Migration Outlook stated that this known phenomenon had reached a new level in recent years through the systematic integration of migration into hybrid warfare strategies, and in the event of an actual war, the equally systematic attempt to force third parties to make concessions by means of forced migration. The Outlook had concluded that, in all likelihood, the EU would have to deal with related attempts in 2023 as well. In November, the Finnish government announced that it had been forced to close its eastern border, assuming that Russia allowed migrants and asylum seekers to enter its territory and subsequently directed them towards Finland in retaliation for the country joining the NATO military alliance. This situation, as well as other instances of actual or alleged instrumentalisation, can be expected to extend well into 2024 and to drive the debate on the link between migration and security in Europe, including the issue of migrants' security and the access of refugees and asylum seekers to protection and a fair asylum procedure.⁵²

Security concerns were a third link between geopolitics and migration and an important feature of the 2023 migration year, namely the increasing use of expulsion towards migrant populations deemed irregular or undocumented residents in important host countries. In 2023, the governments of

⁵⁰ Cóbar, J.F.A., Barnhoorn, A., Bell, N., Broek, E., Eklöv, K., Faller, J., Gadnert, A., Hegazi, F., Kim, K., Krampe, F., McAllister, C., Michel, D., Remling, E., Smith, E., Smith, D., Staudenmann, J.A., Dabelko, G.D., Alfaro, E.S., Maalim, H., Bell-Moran, D., Black, R., Busby, J., de Coning, C., Eberlein, A., Ndiloseh, M., Pattison, C. and Ray, C., Environment of Peace: Security in a New Era of Risk (SIPRI: Stockholm, 2022), accessed 3 January 2024, <https://doi.org/10.55163/LCLS7037>, p. 12.

⁵¹ UNHCR, Mid-Year Trends 2023, accessed 3 January 2024, <https://www.unhcr.org/mid-year-trends-report-2023>, p. 8.

⁵² ECRE (European Council on Refugees and Exiles), Finland: Partial Re-opening of Borders with Russia Amid Concerns Over Refugee Rights, 15 December 2023, accessed 2 January 2024, <https://ecre.org/finland-partial-re-opening-of-borders-with-russia-amid-concerns-over-refugee-rights-border-closure-raises-fears-among-latvia-lithuania-and-estonia-migrants-stuck-in-a-geopolitical-drama/>.

Pakistan, Iran, Algeria and Tunisia either introduced or intensified repatriation policies and programmes. They argued that the measures were intended to enforce existing migration legislation but were also necessary to respond to growing security concerns among their own populations and terrorist threats associated with certain immigrant groups and their home governments. In 2024, policies related to the “securitisation of migration” will continue in many of the world’s regions and presumably affect additional hundreds of thousands of people. Thus, they might play their part in growing levels of so-called secondary migration flows towards the EU.

A fourth link that is not as obvious at first glance, but which can have a huge impact on the global migration environment, is the interlinkage between migration policy and foreign and security policy, both in the external relations of States and in questions of domestic policy. Analysts, for instance, also linked the 2023 Nigerien coup d’état to growing geopolitical competition in Africa and diminishing Western and European influence as well as to domestic reasons.⁵³ Niger was and is a key partner in the EU’s attempts to control irregular migration flows in Africa and the coup calls into question both Niger’s willingness to maintain this cooperation and the bloc’s readiness to provide funding for what it considers an unconstitutional government. For the EU, losing friends in major regions of origin and transit of irregular migration also narrows the space for cooperation on related issues and increases the risk that irregular flows headed towards Europe will intensify in 2024. In the USA, to quote an example of domestic policy links, Republicans in Congress tied approval of the administration’s foreign aid package, including financial support and arms supply for Ukraine, Israel and Taiwan, to a far-reaching tightening of migration and protection policies at the southern border. If no compromise can be reached, a largely domestic migration policy issue might have serious repercussions on global security and stability in 2024, a development that would certainly lead to more displacement and irregular migration as well.

The pivotal role of migration in election campaigns

2024 is a big election year. In 50 nations, about 2 billion people will be called to the ballots.⁵⁴ In Europe, elections at national and state level, and, most importantly, to the European Parliament are expected to bring gains for the political right and populist parties.⁵⁵ Migration will feature as a central theme in the European campaigns but also in the run-up to the US presidential election in November. In view of widespread dissatisfaction among electorates with high levels of irregular migration and asylum applications, ruling governments and parliamentary majorities will try to prove that they are capable of developing and pushing through policies that address the migration issue in a more sustainable way or bring down the numbers of irregular arrivals in their country. In this regard, governments could emphasise last year’s agreement on the New Pact on Migration and Asylum between the EU Member States and the European Parliament as a major achievement. Several cornerstones of the pact are

⁵³ Basedau, M., Coups in Africa – Why They Happen, and What Can (Not) Be Done about Them.

⁵⁴ Politico, Brussels Playbook, Welcome to 2024, a world full of crazy elections, 1 January 2024, accessed 2 January 2024, <https://www.politico.eu/newsletter/brussels-playbook/welcome-to-2024-a-world-full-of-crazy-elections/>.

⁵⁵ Economist Intelligence, Europe: elections to watch in 2024, 17 November 2023, accessed 2 January 2024, <https://www.eiu.com/n/europe-elections-to-watch-in-2024/>.

clearly aimed at reducing irregular migration and the number of asylum applications in the EU, namely the introduction of mandatory border procedures for asylum applicants who have misled the authorities with false information or who have a nationality with an overall low recognition rate; a new mechanism for mandatory but flexible solidarity in the EU; and the streamlining of the current Dublin rules that should also discourage secondary movements between the Member States.⁵⁶

Notwithstanding the controversy that the legislative proposals have raised for overly restricting access to territorial asylum⁵⁷ and outstanding questions regarding implementation and feasibility, the compromise on a fundamental overhaul of the EU's migration asylum and migration policy seven years after it was initially proposed can indeed be seen as a "signal political accomplishment".⁵⁸ The EU has shown that it remains capable of acting, and that the Member States are willing to seek compromises and push ahead with reforms even on the most contested issues. The agreement still requires a formal vote by EU lawmakers and, once this is accomplished, will have an implementation period, i.e. the transposition of the legislative texts into national law, of two years.⁵⁹ The hoped-for effects of the pact will come too late to swing public opinion in regard to this year's elections. Consequently, European governments and the European institutions will continue to search for "fixes" that promise fast delivery and have high visibility in the context of the national and European elections.⁶⁰ They have already done so in 2023 at EU level, for instance in the framework of the memorandum of understanding agreed between the EU and Tunisia, encompassing financial and technical assistance including support for stronger border management, facilitation of the repatriation of Tunisians under the obligation to leave the EU, and the expansion of pathways for regular migration and seasonal work,⁶¹ but also on a bilateral level, for instance in the framework of renewed cooperation agreements between Italy and Libya.

Last year, much of the debate and many of the initiatives discussed or already implemented centred around "external processing" or "asylum offshoring", namely the "pre-arrival, full or preliminary, processing of an asylum claim by the authorities of a destination country while a protection seeker is in another state".⁶² In broad terms, external processing includes the granting of humanitarian visas for

⁵⁶ Spindelegger, M., The Pact on migration and asylum and the evolution of the EU migration policy, in: European Court of Auditors, ECA Journal 02/23 – Migration policy and the EU, p. 98–101, accessed 2 January 2024, https://www.eca.europa.eu/ECAPublications/JOURNAL-2023-02/JOURNAL-2023-02_EN.pdf.

⁵⁷ Endres de Oliveira, P. and Feith Tan, N., External Processing: A Tool to Expand Protection or Further Restrict Territorial Asylum?, MPI (Migration Policy Institute), February 2023, accessed 12 January 2024, <https://www.migrationpolicy.org/research/external-processing-asylum>, p. 23.

⁵⁸ Beirens, H. and Le Coz, C., One Phase Closes for the New Pact on Migration and Asylum. Now Another Begins, MPI (Migration Policy Institute) Commentaries, December 2023, accessed 2 January 2024, <https://www.migrationpolicy.org/news/new-pact-migration-asylum>.

⁵⁹ Vasques, E., EU institutions reach comprehensive deal on migration, Euractiv, 20 December 2023, accessed 2 January 2024, <https://www.euractiv.com/section/politics/news/eu-institutions-reach-comprehensive-deal-on-migration/>.

⁶⁰ Ross, T., Dickson, A., Caulcutt, C., Ward, M., Spector, J., Karnitschnig, M., Roberts, H., Haeck, P., Pogatchnik, S., Lum, Z.-A., Hernandez-Morales, A. and Stamouli, N., Migration is derailing leaders from Biden to Macron. Who's next?, Politico, 15 December 2023, accessed 2 January 2024, <https://www.politico.eu/article/migration-is-derailing-leaders-from-biden-to-macron-whos-next/>.

⁶¹ Mixed Migration Centre (MMC): Quarterly Mixed Migration Update: North Africa, Quarter 3 2023, p. 9.

⁶² Endres de Oliveira, P. and Feith Tan, N., External Processing, p. 1.

people in an immediate crisis situation or along migratory routes to create safe access to a destination country; state-led evacuation programmes for such populations; or the establishment of processing centres outside destination countries where asylum claims are processed and in the case of a positive decision, recognised refugees are granted access to the processing country or are resettled to another country providing protection. Theoretically, processing centres can enhance access to protection for those in need by offering more safe pathways than “spontaneous arrivals” can do. Experience shows, however, that they are mainly discussed in the context of deterring spontaneous arrivals, making destinations less attractive for asylum seekers and ultimately reducing overall application numbers. The recent European debate focused less on the protection aspects that could be afforded to centres in third countries and more on the deterrent effects of denied access to the territory of destination countries during the procedure. This will also be the case in 2024.

The idea of external processing has a long history. The concept was first discussed in the context of Vietnamese boat refugees in the 1970s, when it mainly referred to evacuation and subsequent resettlement. In 2003, the British government proposed external processing at EU level to decrease the number of arrivals of asylum seekers. In response to the 2015 refugee crisis, EU Member States proposed “refugee centres” in Libya or “welcome centres” and asylum “hotspots” in other North African countries. However, none of these proposals materialised. Already since 2012, Australia’s Pacific Solution, transfers intercepted asylum seekers to offshore processing centres in Papua New Guinea and Nauru. Those recognised as refugees are – or should be – resettled to third countries with no prospect of gaining protection on Australian territory. The “Australian model” has influenced the debate in Europe ever since and inspired recent initiatives on external processing. Denmark passed legislation in 2021 that allows for processing of asylum claims in partner countries outside Europe and the subsequent protection of these asylum seekers in those countries. In 2022, the United Kingdom concluded an agreement with Rwanda similar to the Danish approach. Last year, however, the UK Supreme Court ruled the plan was unlawful because Rwanda was not to be considered a safe country for asylum seekers. The UK government reacted by concluding a new agreement with Rwanda to strengthen its asylum system, and by proposing new legislation that declared Rwanda to be a safe country.⁶³ In November 2023, Italy and Albania announced the signing of an agreement on Strengthening Collaboration in the Field of Migration, aiming at the establishment of processing centres in Albania for asylum seekers previously rescued at sea by Italian vessels. The agreement envisages the transfer of up to 3,000 individuals to two centres or “structures” in Albania and is intended to be operational from spring 2024. A total of 36,000 people should be processed each year. The agreement excludes minors, pregnant women and other vulnerable individuals. The structures, to be operated by Italian authorities, will be established in Albanian territory under Italian jurisdiction, and should cater for disembarkation, identification, accommodation, the actual procedure and repatriation for those deemed ineligible for protection. The agreement is intended to have a five-year

⁶³ BBC News, What is the UK’s plan to send asylum seekers to Rwanda?, 13 December 2023, accessed 2 January 2024, <https://www.bbc.com/news/explainers-61782866>.

duration and be renewable unless either party opts for withdrawal.⁶⁴ The Albanian constitutional court temporarily blocked the agreement in December, however, and ordered additional hearings to determine the constitutionality of the agreement,⁶⁵ which will at least delay its actual implementation.

Even when leaving aside the controversy over restricting asylum seekers' rights and access to protection, external processing is complicated by a number of factors, such as the aforementioned issues related to extraterritorial jurisdiction, which, should it be required, tends to clash with national and international legislation; challenges to ensure the capacities in partner countries needed for a fair and legally sound asylum procedure; the need to maintain partnership over extended time periods and in the case of government change; civil society criticism; and considerable financial costs. Moreover, in the European case there is no robust evidence yet that external processing really delivers on its main political goal, i.e. a significant reduction of arrivals and application figures. 2024 will show if existing challenges can be addressed successfully, and, if so, policies on external processing can swing elections in favour of the political powers that pursue them.

At the same time, it will be important not to lose sight of the further development of one of the central pillars of EU cooperation in the field of migration. EU-Türkiye cooperation will continue to play a pivotal role in the management of migration flows within the wider European region. Joint action in the framework of the EU-Türkiye Statement / 18 March Agreement has been decisive in addressing the enormous challenges during the 2015 refugee crisis and ever since. Discussions on future modes of cooperation will continue throughout 2024 and their outcome will be a crucial factor in shaping the situation on one of the most critical migratory routes.

Labour migration “coming of age” in Europe

As mentioned above, the political debate in Europe in 2024 will primarily revolve around the issues of irregular migration and asylum. However, this does not mean that there will be no significant developments in the area of legal migration as well. Quite the opposite will be the case. Today, and for the foreseeable future, European governments must face a double challenge. On the one hand, they find themselves forced to prove more achievement in the area of irregular migration and in reducing the high number of asylum applications, and to communicate this successfully to their citizens and voters. On the other hand, in an ageing Europe the demand for a skilled and/or essential labour force increases every year and with it the pressure to deliver results in this area of migration policy as well.

Labour migration is a complex issue. In simplified terms, European governments have five principal fields of action at their disposal to meet the demand for migrant workers: First, the opening of labour markets and lowering of legal thresholds for the access of qualified candidates. Second, contractual and practical cooperation with countries of origin to facilitate and manage labour flows. Third, and linked to point two, active recruitment policies and programmes in countries of origin. Fourth, the

⁶⁴ Piccoli, L., No Model for Others to Follow, 14 November 2023, accessed 2 January 2024, <https://verfassungsblog.de/offshoring-asylum-the-italian-way/>.

⁶⁵ BBC News, Court suspends Italian plan to hold migrants in Albania, 14 December 2023, accessed 2 January 2024, <https://www.bbc.com/news/world-europe-67715111>.

creation of skills, training or talent partnerships with countries of origin to enhance the pool of skilled labour that has obtained the necessary formal and practical qualifications to perform on European labour markets. And fifth, a further mobilisation of available potentials, i.e. facilitating and promoting the access of resident migrant populations or their further qualification with regard to required skills.

Against the backdrop of swiftly growing skills and labour force gaps in recent years, and once the mobility restrictions related to the Covid-19 pandemic had ended, EU Member States stepped up their efforts to facilitate recruitment from abroad and to reform the underlying labour migration regimes in a quite significant way. This trend also continued in 2023. Labour migration is largely in the domain of the Member States, which makes it almost impossible to present the myriads of recent initiatives in a short and concise manner. A non-exhaustive list of last year's developments includes the passing of new legislation to facilitate labour migration; higher quotas for non-EU country workers; the extension of occupation shortage lists; special permits to fill specific occupations, for instance in the health sector, and to attract in-demand skills or experience; introduction of job search visas; fast-track avenues for specialists; streamlining and simplification of skills recognition; opening of (limited) labour market access for asylum seekers during procedure or migrants with a long-term "tolerated" status; regularisation programmes for certain previously undocumented groups; the further conclusion of migration and mobility agreements with non-European partner countries; and the establishment of new institutional frameworks to encourage the employment of foreign workers at the domestic level and to actively support recruitment in countries of origin.⁶⁶

However, the new approaches in European labour migration policy do not just pursue the principle of more openness. Several Member States also introduced additional restrictions for certain immigrant groups, mainly for low-earning migrants in low-skilled occupations, and with regard to family reunification and naturalisation. They often did this in order to fulfil previously made election promises to reduce immigration. Taking into account the growing competition for global talent, the fact that in Europe there are also increasing demands for a so-called low-skilled yet highly essential workforce, and the experience that the possibility to be joined by family members and to obtain long-term residence or citizenship are crucial in the decision about whether or not to move to a country, it remains to be seen whether the aforementioned restrictions influence the size and direction of labour migration to and within the EU. On the part of the European institutions, the Commission presented a new Skills and Mobility package in November that should help to address "critical labour shortages".⁶⁷ Cornerstones of the proposed measures are the recommendations on the "recognition of qualifications of third country nationals" and Europe on the Move, intended to boost intra-EU mobility,

⁶⁶ OECD, International Migration Outlook 2023, accessed 2 January 2024, <https://www.oecd-ilibrary.org/sites/437cf997-en/index.html?itemId=/content/component/437cf997-en>.

⁶⁷ European Commission, Commission proposes new measures on skills and talent to help address critical labour shortages, Press Release, 15 November 2023, Brussels, accessed 2 January 2024, https://ec.europa.eu/commission/presscorner/detail/en/IP_23_5740.

and the establishment of an EU Talent Pool,⁶⁸ enabling candidates from non-EU countries to register their experience, skills and qualifications, and contact details to be matched with an existing vacancy. Notably, the Talent Pool should not be limited to highly qualified workers but open to all essential skill levels. Once a match is made, candidates would still have to go through Member States' national admission processes. One of the major objectives of the Talent Pool is to support small and medium-sized enterprises, which do not have the extensive networks of multinational companies, to recruit from abroad.⁶⁹ The Commission's proposal will be negotiated by the European Parliament and the Council throughout 2024 and will thus only show its effects in subsequent years.

On Member State level, in 2024 we can expect increasing efforts to be made to expand migration partnerships, labour agreements or MoU to additional countries and regions of origin; institutional frameworks supporting skilled immigration to be further developed; and direct recruitment in countries of origin to be stepped up. Member States will particularly seek to cooperate with countries with compatible or at least comparable educational and training standards, for instance in Latin America or South-East Asia, to meet demands and to navigate the obstacles of missing formal qualifications. These attempts will be accompanied by growing numbers of active recruitment policies and programmes. Their effects will, however, continue to be limited by a structural skills mismatch between the demand and supply sides of labour migration. The European labour markets with their high degrees of specialisation and formalisation require equally high degrees of formal and practical qualifications from those who want to enter them. At present, most of the necessary standards are taught almost exclusively at the domestic level in destination countries. Skills, training and talent partnerships that address the skills mismatch on the basis of joint and mutually recognised vocational training standards are the best option to bridge existing gaps between countries of origin and destination. Related initiatives, like the EU Talent partnerships, started some time ago but have not yet reached the levels necessary for having really tangible impacts. The latter will be the case this year too, focusing much of the debate on the fifth option mentioned above, the further mobilisation of migrant and refugee populations already residing on the territories of the Member States.

At the end of October 2023, there were 4.24 million (Ukrainian) beneficiaries of temporary protection registered in the EU who, depending on their age, benefit from direct access to the labour markets. Despite a formally similar starting position, the actual enrolment of Ukrainians developed quite differently in the respective Member States. Denmark led the way with 78% of Ukrainian beneficiaries of temporary protection in paid employment, followed by Poland and Czechia, where two thirds of Ukrainians were employed. The Netherlands, the UK and Ireland reported over half of Ukrainians in work, while Germany, Switzerland and Austria reported lower employment figures of 17%, 20% and 27% respectively. However, Member States with lower employment rates also considered the degree

⁶⁸ European Commission, Proposal for a Regulation of the European Council and of the Council Establishing an EU Talent Pool, Brussels, 15 November 2023, COM (2023) 716 final, accessed 12 January 2024, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52023PC0716>.

⁶⁹ Dempster, H. and Knoll, A., The EU's Talent Pool is Live, But Will it Attract Skilled Non-EU Migrants?, Center for Global Development, 21 November 2023, accessed 2 January 2024, <https://www.cgdev.org/blog/eus-talent-pool-live-will-it-attract-skilled-non-eu-migrants>.

of Ukrainian enrolment a success, citing faster job placement compared to previous refugee cohorts. Notwithstanding this, in the third year of residence in the EU, the high educational qualifications of the mainly female Ukrainian refugees have not translated into sufficient and adequate employment opportunities, with many confined to low-paid jobs in hospitality, agriculture and temporary positions. Despite a shortage of healthcare professionals, only 7% of Ukrainian refugees, approximately 50,000 trained healthcare workers, were employed in this sector. Efforts to address this issue through targeted measures have shown some promising results but are still limited in their scope.⁷⁰ With temporary protection for Ukrainians entering its third and final year, 2024 is likely to see a reinforced debate on the future status of beneficiaries as well as on their economic and labour market integration. The third year after arrival is normally also the year when labour market participation of a refugee cohort starts to rise significantly. In the case of Ukrainian refugees, as with all other refugee populations, the debate should also be about expanded and more targeted training to allow them to make better use of their educational attainments and professional backgrounds, to avoid further “brain waste” and “brain loss”, and to secure their highly sought-after skills and motivation for the European labour markets.

⁷⁰ Thränhardt, D., Die Zukunft der ukrainischen Kriegsflüchtlinge in Europa [*The future of war refugees from Ukraine in an open Europe*], 30 November 2023, accessed 12 December 2023, <https://www.fes.de/iez/gerechtigkeitswoche-2017/artikel-in-gerechtigkeitswoche/die-zukunft-der-ukrainischen-kriegsfluechtlinge-in-europa>.

Conclusions for 2024

In 2024, the situation in the wider European region will continue to be shaped by migration-related developments in Ukraine, the Near and Middle East, South Asia, African regions and Latin America. This does not mean that other countries or regions deserve less attention, but the major migration movements towards Europe will be linked to the situation in these environments. Continued economic crises, natural disasters and a worsening security situation in many countries and regions of origin will drive mobility, both voluntary and forced, both legal and irregular. European countries must prepare for persistent migration pressures and high numbers of arrivals of asylum seekers and irregular migrants.

Geopolitics and migration will remain closely intertwined in 2024. Concerns regarding the instrumentalisation of migration by adversaries or domestic threats associated with immigrant populations will increase the observed trends towards securitisation of migration, large-scale expulsions and secondary flows. European and US elections will feature migration as a primal theme, with governments and opposition forces trying to convince their voters of their concepts for reducing irregular arrivals and asylum applications.

The political debate will often centre around the external processing of asylum applications, raising questions of feasibility, cooperation with non-European partners and the access of refugees to international protection. The developments linked to related initiatives, like the agreement between Italy and Albania and the envisaged cooperation between several European States and Rwanda, will be closely followed and, if good progress is made, incorporated in political programmes and state policies.

The first year of the implementation of the EU's New Pact on Migration and Asylum and the further development of labour migration policies in the EU and its Member States will receive less public attention but represent equally important and future-oriented avenues towards better functioning migration governance in Europe and beyond.

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