ICMPD
International Centre for
Migration Policy Development

ICMPD Migration Outlook 2025

Ten migration issues to look out for in 2025:

Origins, key events and priorities for Europe

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1 Global displacement growing at a fast pace

Despite the complex and multifaceted nature of migration, state fragility and violent conflict will remain key drivers of migration trends in 2025, as in previous years. According to UNHCR, the number of forcibly displaced people had risen to an estimated 122.6 million by mid-2024, marking an 11.5% increase compared to 2023. Two billion people live in conflict-affected areas. Globally, these areas have expanded by 65% since 2021, with sub-Saharan Africa experiencing the most significant growth. All indicators suggest that this trend will continue into 2025, potentially exacerbated by escalating conflicts such as those in the Sahel and influenced by major geopolitical events like the latest presidential elections in the USA or the fall of the Assad regime in Syria.

2 European migration trends fraught with uncertainty

An analysis of irregular migration indicators and asylum application numbers in 2024 reveals three conclusions. First, global displacement trends have, for the first time in years, decoupled from corresponding numbers in Europe, although the figures remain high. Second, the reduction in numbers and distinct shift in migration routes indicate a tangible impact of recently introduced migration policy measures in the EU and beyond. And third, the numerical changes are neither significant nor sustained enough to justify referring to a real turning point in the European migration environment. The root causes of displacement persist, both globally and in the European neighbourhood, and governments should be prepared to deal with a range of migration scenarios in 2025.

3 A world becoming more restrictive towards migration

The year 2024 saw a global trend towards more restrictive migration policies. Many destination countries for displaced people and irregular migration flows implemented measures to hinder physical access to their territories or facilitate the repatriation of undocumented populations. Finland and Poland expanded fences and walls at their borders, as did Iran and Türkiye, while the new US administration plans to resume construction of the wall along its border with Mexico. Algeria, Libya, Tunisia, Colombia and Panama, Iran and Pakistan carried out large-scale expulsion programmes in 2024 and intend to continue these policies in 2025. Similar plans have also been announced by the incoming US government. Meanwhile, the EU intends to focus on the externalisation of asylum processing and on improving return measures.

4 Global impact of the second Trump presidency

The incoming president centred his campaign on promises of stringent border reforms, interior enforcement, increased deportations and the termination of humanitarian protection and regularisation programmes. On the one hand, this paradigm shift from the previous administration could divert migration flows away from the United States to Europe and other regions. On the other, it will impact the migration policy debate in Europe, providing further momentum to those advocating for stricter enforcement of expulsions and more political pressure on countries of origin and transit. In recent years, the EU has had positive experiences with agreements with neighbouring States that emphasise economic cooperation and allow for a cautious opening up of labour migration in addition to controlling migration. The impact of changed US rhetoric and policy on the European debate could challenge this partnership-based approach, particularly if the new US government succeeds in implementing large-scale expulsions as announced. In 2025, it can be expected that European policymakers will closely monitor these developments and may place even greater emphasis on swift and high-profile measures to curb irregular migration.

5 The search for “innovative solutions” to irregular migration

In 2025, the EU and its Member States will focus on implementing the new Migration Pact. However, concerns were already raised last year that the new legislative package fell short in some areas, calling for additional measures to address irregular arrivals. This led to calls for “innovative solutions”, which primarily focused on the externalisation of asylum procedures but as a new emphasis also on creating “return hubs” in third countries. Experiences of externalisation models, such as the Italy–Albania memorandum, have highlighted a number of legal, operational and political challenges. Given the even greater challenges return hubs would face, it remains to be seen whether such centres can be established and made operational by 2025. However, the concept will continue to be a political priority, with legal amendments such as the discontinuation of the “connection criterion” creating the necessary political and legal foundation.

6 A European Union focusing on return

Limited success in enforcing the return of foreign nationals is widely viewed as a core weakness in the European migration system. Recent data indicate that only one in five third-country nationals required to leave the EU was recorded as having done so. Against this backdrop, European decision-makers will make increasing the number of returns a key policymaking priority in 2025. In addition to a debate on externalisation, the emphasis will be on pragmatic reform proposals such as the mutual recognition of return decisions, digitalising case management, defining returnees' obligations, increasing voluntary return options, extending the role of Frontex and cooperating with partner countries on capacity development. A major focus will remain on the "external dimension", namely on concluding agreements with neighbouring and other non-EU countries. The existing and developing partnerships are widely regarded as successful models, including in the context of migration control, and are likely to remain a cornerstone of the EU's efforts to improve return policies in 2025.

7 The unwritten future of Syrian displacement

The unexpected fall of the Bashar al-Assad regime was one of the most significant geopolitical events of last year. The regime change is likely to have a major impact on mobility dynamics and has already sparked a debate on the potential cessation of protection status for Syrian refugees and their return to their homeland. However, such returns will only be feasible once a range of political, practical and legal issues have been resolved, and the security and economic conditions on the ground have substantially improved. Governments should prepare for a continued volatile migration situation, including pendulum movements in and out of Syria, temporary and permanent returns, and further displacement. Achieving large-scale and durable returns will be challenging, at least in 2025, and host countries may give preference to encouraging voluntary returns in alignment with reconstruction in Syria.

8 The need to prepare for different outcomes of the war in Ukraine

By February, the war in Ukraine will have entered its fourth year. Neither side achieved a decisive breakthrough on the battlefield in 2024, nor was there significant progress towards peace negotiations. With military support from the new US administration potentially reduced, the conflict could take various paths in 2025: "long war", "frozen conflict", "Ukrainian victory" or "defeat" resulting in territorial partition. Experts predict that the war is most likely to continue as a protracted attritional conflict or enter a temporary ceasefire, potentially without the return of occupied territories to Ukraine. These scenarios have a direct impact on displacement, migration and return. An armistice could lead to the return of 1.2 to 2.1 million Ukrainians, while a full Russian occupation might displace over 10 million more. These extreme developments are not the most likely ones, but European governments would be prudent not to rule them out entirely and reflect even the highest projections of displacement in their preparations for 2025. If the conflict in Ukraine takes a negative turn, European countries may again face refugee arrivals on a very large scale.

9 A reinforced debate on the transition of temporary protection

Regardless of the future trajectory of the conflict, Ukrainian migration will be an important issue in the European debate in 2025. By the end of October 2024, a total of 4.2 million Ukrainians were registered in the EU as beneficiaries of temporary protection, including more than 620,000 new authorisations, suggesting significant return and pendulum migration. The labour market integration of Ukrainian beneficiaries of temporary protection also made substantial progress. Recent research established that employment rates increased significantly in European host countries in 2024. Against this background, and with the approaching end of temporary protection in 2026, this year might see additional efforts to devise an EU-wide long-term transition plan. Key discussion points could include the transitioning of beneficiaries of temporary protection to other types of residence permits, ways to allow circular movement, and voluntary return programmes linked to reconstruction. These efforts should always prioritise safeguarding the interests of Ukraine.

10 The quietly growing role of labour migration

Last year, the public debate focused less on labour migration compared to other policy areas. The trend of its growing importance continued, however, both in terms of figures and its role in migration diplomacy. Last year, the number of work permits granted to non-EU citizens grew by 8.9%, authorisations for seasonal work by 22.6% and the number of EU Blue Cards by 8.8%. Due to the effects of demographic change, this trend is not expected to reverse in 2025, even in the face of a potential economic downturn in the EU. At the same time, elements of labour migration and skills partnerships have become firmly embedded in the EU's migration diplomacy and agreements with non-European partners. What will also not change is the complexity of this policy field. A recent mapping identified almost 300 different labour migration avenues across the EU-27. As the global competition for talent intensifies, this fragmentation will remain a competitive disadvantage in 2025 and beyond.

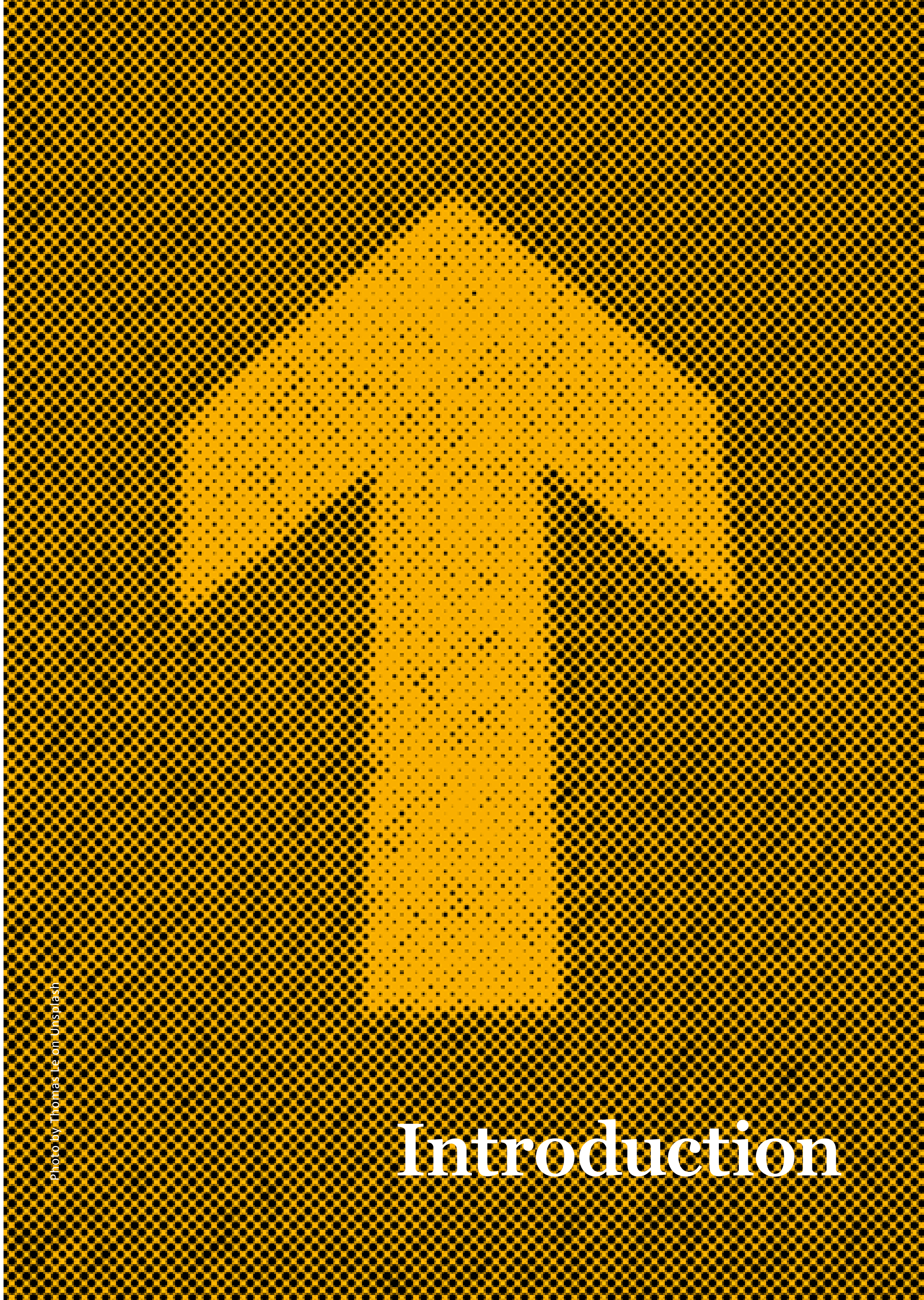


Photo by Thomas Le on Unsplash

Introduction

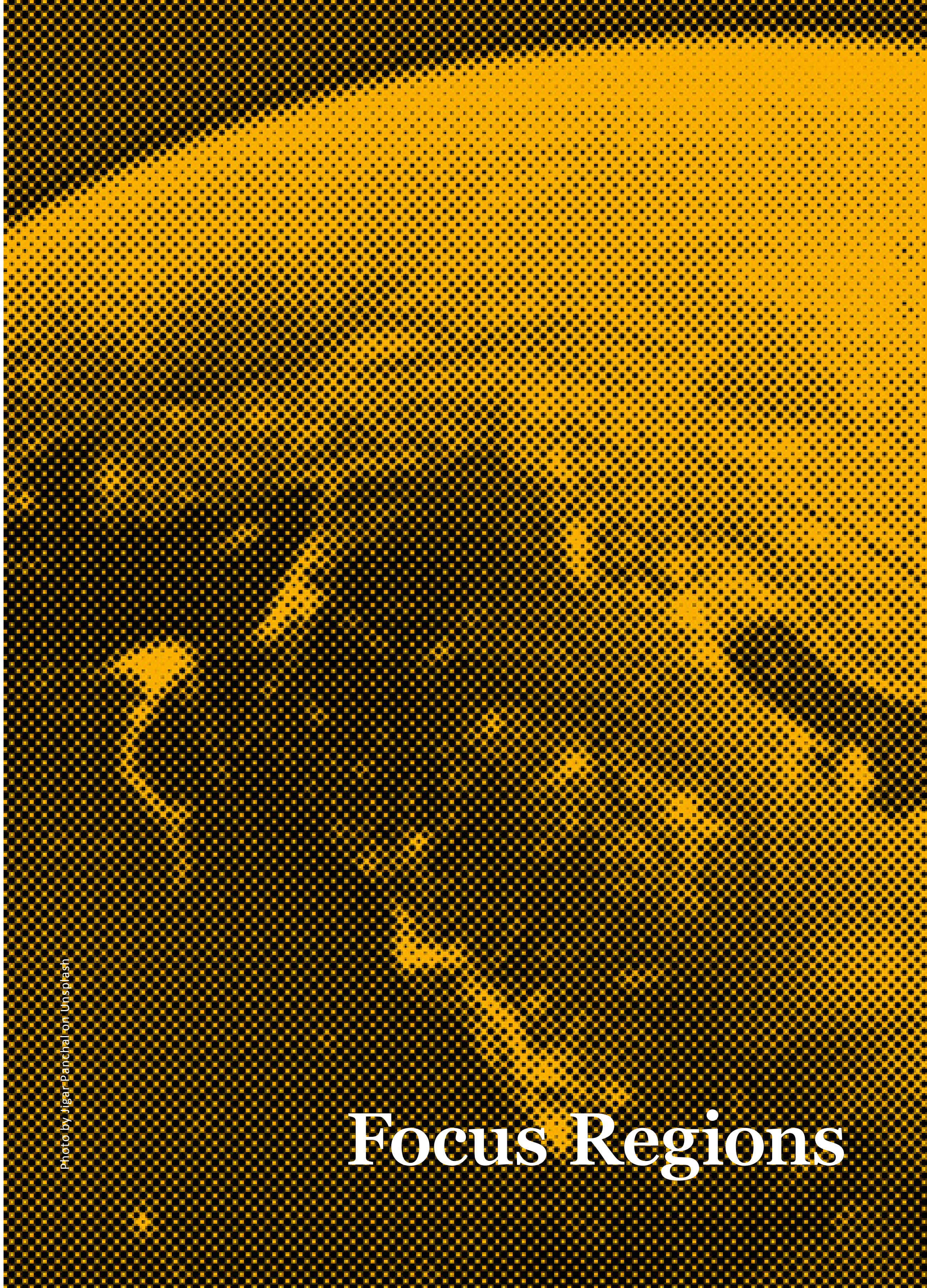
ICMPD's Migration Outlook presents a brief analysis of recent migration and policy trends and provides an outlook on developments and events to watch out for in 2025. It does not claim to foretell the future or to cover all relevant trends. It aims to use past experience and highlight what might happen, as well as what is important to consider.

In 2025, the political world and the world of migration will continue to experience high levels of volatility. This will be marked 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 fixed place in the current migration environment. Displacement is a consequence of military operations as well as attempts to enforce concessions from other States by means of forced migration.

The number of armed conflicts has almost doubled over the last decade, and state fragility and violent conflict will remain key drivers of migration trends in 2025. According to UNHCR, the number of forcibly displaced people had risen to an estimated 122.6 million by mid-2024, marking an 11.5% increase compared to 2023. Two billion people live in conflict-affected areas. Globally, these areas have expanded by 65% since 2021, with sub-Saharan Africa experiencing the most significant growth.[1] All indicators suggest that this trend will continue into 2025, potentially exacerbated by escalating conflicts such as those in the Sahel and influenced by major geopolitical events like Donald Trump's second presidency or the fall of the Assad regime in Syria.

1 Brennan, H. and Durmaz, M., Global conflict zones grow by two thirds since 2021, Verisk Maplecroft Political Risk Outlook, 21 November 2024, p. 12

Irregular migration will once again dominate the European debate, as will the global effects of a second Trump presidency, the search for “innovative solutions” and effective externalisation models, a European Union focused on return policies, the uncertain future of Syrian displacement, and the need to prepare for various outcomes of the war in Ukraine. However, this focus does not mean that there will not be significant progress in legal and labour migration. Although they may not receive as much attention in political debates, they remain critically important for addressing the challenges of ageing societies, fostering deeper dialogue and enhancing concrete cooperation across regions and along migratory routes.



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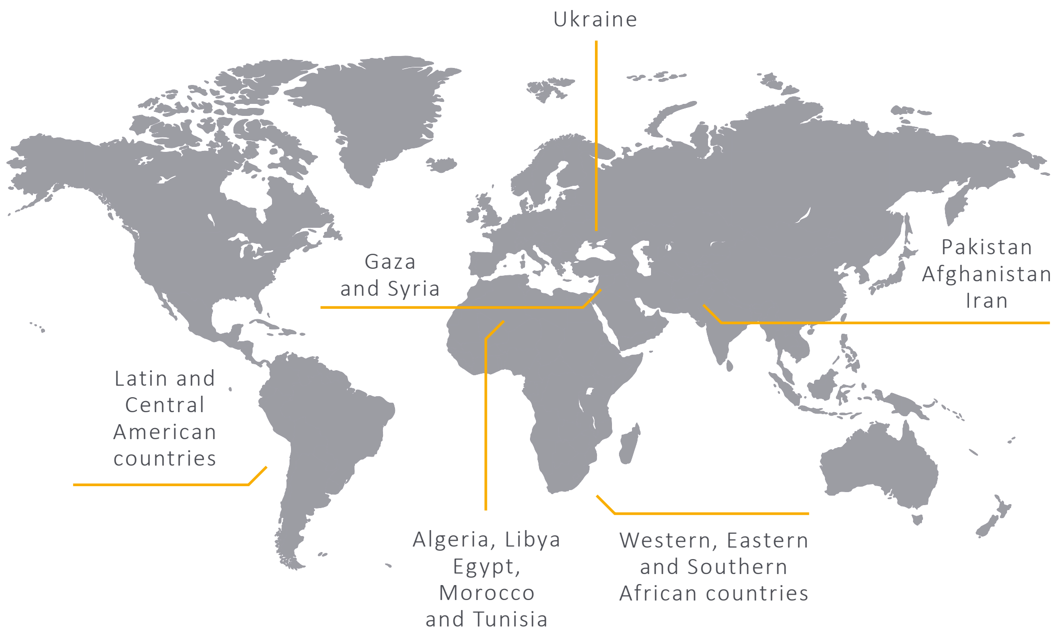
Focus Regions

Focus regions

In 2025, 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.



Afghanistan

According to recent UNHCR data, the Afghan refugee population is the largest worldwide. In 2024, a total of 6.4 million Afghans were considered in need of international protection, representing an increase of more than 12% compared to the previous year.[2] The neighbouring countries of Iran, Pakistan, Tajikistan, Uzbekistan and Turkmenistan host a total of 5.5 million Afghans in a refugee-like situation, with 1.3 million Afghans in Pakistan registered as refugees and 761,000 in Iran.[3] Another 5.5 million Afghans reside in these two countries as labour migrants, family passport holders or in an undocumented situation. An additional 3.2 million people are considered displaced within Afghanistan and the OCHA anticipates that in 2025, some 22.9 million people or almost half of the population will require humanitarian assistance to survive, including 3.7 million people left without access to healthcare.[4] Afghanistan's GDP grew by 2.7% in 2024, and moderate growth is expected in 2025. However, the economy is still far from recovering from its previous losses. It shrank by almost one third in the aftermath of the Taliban takeover in August 2021 due to structural challenges, trade imbalances, limited investment, and inadequate education and healthcare systems. The complete ban on women's and girls' participation in economic and educational life is a major contributor to economic stagnation. The "Morality Law" of August 2024 curtailed women's participation in public life even further, imposing strict restrictions on their freedom of movement and barring women and girls from secondary and tertiary education. The security situation remained stable in 2024, but the human rights situation continued to deteriorate, with restrictions on freedom of assembly and political expression, suppression of civil society and the media, corporal punishments and public executions. Both voluntary and forced returns of Afghans, particularly those from neighbouring countries, add to the difficult economic and humanitarian situation.
By 2023, Pakistan and Iran had already started large-scale expulsions of Afghans considered to be staying illegally on their territory. During the first phase of Pakistan's "Illegal Foreigners Repatriation Plan", an estimated 733,000 undocumented Afghans returned to their home country in 2023. This will be followed in 2025 by phases 2 and 3, targeting individuals with temporary residence and holders of a UNHCR-issued Proof of Registration card. In September 2024, Iran announced plans to expel 2 million out of the 4.5 million Afghans believed to be staying in the country by March 2025.[5] These announcements have already led to a significant rise in largely undocumented returns. In September and October 2024 alone, around 475,000 people crossed into Afghanistan, while between January and December 2024, about 1.2 million undocumented migrants returned to Afghanistan, including 1.1 million from Iran and 80,000 from Pakistan.[6] Due to the planned expulsion in the main destination countries in the neighbourhood, along with a worsening human rights situation in the country, expected droughts caused by a La Niña pattern in 2025, and a dire economic outlook, there is a high likelihood of emigration from Afghanistan as well as secondary movements from the neighbouring countries towards Türkiye and the EU. For more than 20 years, Afghanistan has been one of the most important countries of origin for asylum seekers in the EU. In 2024, Afghan applications accounted for the second highest number among all applicant nationalities after Syria (67,757 applications as of October, representing 8.1% of all applications).[7] However, the decline in both the number of Afghan nationals apprehended at the EU's external borders and the number of asylum applications submitted in the EU continued, as had already been the case in 2023.[8]

2 UNHCR, Global Trends 2023, accessed 3 January 2025, https://www.unhcr.org/global-trends-report-2023, p. 15

3 UNHCR Operational Data Portal, Afghanistan situation, accessed 3 January 2025, https://data.unhcr.org/en/situations/afghanistan

4 OCHA (United Nations Office for the Coordination of Humanitarian Affairs), Afghanistan Humanitarian Needs and Response Plan. Humanitarian Programme Cycle 2025, p. 3

5 Mixed Migration Centre (MMC), Quarterly Mixed Migration Update: Asia and the Pacific, Quarter 3 2024, p. 5

6 OCHA (United Nations Office for the Coordination of Humanitarian Affairs), Afghanistan Humanitarian Needs and Response Plan. Humanitarian Programme Cycle 2025, p. 5

7 Eurostat, Asylum applicants by citizenship, age and sex – monthly data (January 2023 to October 2024), accessed 2 January 2025

8 ICMPD Migration Outlook 2024. Ten migration issues to look out for in 2024, accessed 3 January 2025, https://www.icmpd.org/publications/icmpd-migration-outlook, p. 6

Asylum applications went down by 28% and border apprehensions by 24%. This two-year trend can most likely be attributed to the strict border and immigration control measures imposed by Türkiye and other countries. In 2024, Turkish authorities apprehended a record high of 65,000 irregular migrants from Afghanistan.[9] The fact that the majority of refugees and prospective migrants in economically deprived Afghanistan do not have the financial means to fund the expensive journey to Europe or to pay migrant smugglers for their services will also play a significant role.

9 Presidency of Migration Management (PMM), Migrants in Irregular Situation in Türkiye, accessed 3 January 2025, https://en.goc.gov.tr/irregular-migration

Pakistan

Pakistan is one of the world's most important origins and destinations for international migration flows. More than 11 million Pakistani nationals are employed abroad as labour migrants, with more than 90% working in Saudi Arabia, the United Arab Emirates, Oman and Qatar. In 2023, an additional 862,625 Pakistani nationals left the country to seek economic opportunities abroad.[10] Labour emigration makes vital economic contributions at both the macro and micro levels. Pakistan ranks fifth globally among the top recipient countries for migrant remittances, and these transfers are crucial for the country as they account for about 10% of its GDP, have remained a stable source of household income during economic crises, including the global financial crisis and the COVID-19 pandemic, and positively affect the balance of payments and macroeconomic stability.[11] In this context, Pakistan has increasingly sought to intensify cooperation with the EU on legal and labour migration. The EU is also highly interested in deeper relations, given the increasing demand for foreign workforce due to demographic changes as well as the interest in reducing irregular arrivals and the annual number of asylum applications submitted from a traditionally important country of origin. A recent development in this realm was the European Commission's launch of a new programme to support a Talent Partnership between the EU and Pakistan in November 2024 after the two parties had launched a Migration and Mobility Dialogue in 2022. Deeper cooperation based on mutual interests has the potential to contribute to achieving another objective, namely a further reduction in the number of asylum seekers and irregular arrivals from Pakistan. After peaking in 2023, these numbers fell significantly again in 2024. Asylum applications went down by more than 32% and detections of irregular crossings fell by over 37%, representing the single largest decrease among all nationalities detected last year.

10 Shah, N. M., Shahzad, A., Quddus, S. and Qazi, M., Pakistan Migration Report 2024, Centre on International Migration, Remittances and Diaspora (CIMRAD), Lahore School of Economics, June 2024, p. 2

11 De Padua, D., Lanzafame, M., Qureshi, I. and Taniguchi, K., Understanding the Drivers of Remittances to Pakistan, ABD Economics Working Papers, No. 733, July 2024, Asian Development Bank, p. 1

This indicates that increased political dialogue and cooperation in various migration fields has a positive impact on addressing irregular migration as well. However, Pakistan is also an important country of destination and is one of the largest refugee-hosting countries worldwide. According to UNHCR, there are 1.9 million Afghan refugees or nationals in a refugee-like situation in the country, with more than half a million having entered after the Taliban takeover in 2021, along with another 1.1 million Afghans of another status who are in need of assistance.[12] The difficult economic situation in recent years, dwindling international support for Afghan refugees in the country, and concerns regarding internal security prompted Pakistan's government to announce an "Illegal Foreigners Repatriation Plan" in 2023. In a first phase, the plan targeted unregistered immigrants from Afghanistan and other origin countries and ordered them to leave the country by 1 November or face deportation. The Pakistani government explained that this step was necessary in order to enforce existing migration legislation and to respond to the Taliban government's alleged support for extremists in Pakistan.[13] After completion of the first phase of the plan in 2023, which resulted in the return of an estimated 733,000 Afghans, the Pakistani government announced that it would resume the implementation of the next two phases of the plan in 2025, now targeting Citizen Card and Proof of Registration card holders as well, potentially making another 2.2 million persons subject to expulsion measures.

12 UNHCR, Regional Refugee Response Plan for Afghanistan Situation 2024–2025, accessed 3 January 2025, https://data.unhcr.org/en/documents/details/107144, p. 4

13 O'Donnell, L., Why Pakistan Is Pushing Out Refugees, Foreign Policy, 13 November 2023, accessed 5 January 2025, https://foreignpolicy.com/2023/11/13/pakistan-afghanistan-taliban-refugees-deportation/

Iran

In recent years, Iran has experienced a significant increase in emigration, particularly among young and well-educated citizens. This trend is driven by both economic and political factors, including the enduring impact of international sanctions related to Iran's nuclear programme, deteriorating living conditions for large segments of the population, limited economic opportunities, shrinking civil liberties and a crackdown on political opposition.[14] The EU witnessed a sharp rise in asylum applications from Iranian nationals in 2023. However, this figure declined by more than 36% last year. Looking ahead to 2025, Iran's role in the European migration context could become even more significant due to its position as the host of the largest Afghan refugee and emigrant population worldwide. Additionally, the country is a key transit point for Afghan nationals attempting to reach Europe. Iran's plans to implement a large-scale expulsion policy for this group in 2025 may further influence migration patterns. As in Pakistan, this policy is rooted in security concerns about actual or alleged links to the terrorist organisation Islamic State but is primarily fuelled by growing hostility among some parts of the public towards Afghans living in the country as refugees or without documentation. Hosting an estimated 3.8 million refugees, Iran has the largest refugee population in the world, with 2 million of them being Afghan nationals. An official headcount in 2022 registered a total of 2 million Afghans in the country.[15] Of these, 750,000 held an official refugee card, 360,000 a residence permit, 267,000 a family passport and 500,000 were registered as undocumented.[16]

14 Ziabari, K., Iran's Brain Drain Accelerates as Crackdown on Dissent Intensifies, Stimson Center, 2 May 2023, accessed 3 January 2025, https://www.stimson.org/2023/irans-brain-drain-accelerates-as-crackdown-on-dissent-intensifies/

15 UNHCR, Iran Factsheet, January-September 2024, accessed 4 January 2025, https://data.unhcr.org/en/documents/details/112391, p. 2

16 UNHCR, Refugees in Iran, accessed 4 January 2025, https://www.unhcr.org/ir/refugees-iran#:~:text=It%20is%20estimated%20that%20since,upsurge%20in%20international%20protection%20needs

Initially, and due to linguistic and cultural similarities, they were largely able to integrate into Iranian society without drawing much attention to themselves, often taking on low-skilled and poorly paid jobs in the informal labour market. When an additional estimated 1 million Afghans fled to Iran following the Taliban's takeover in 2021, the mood shifted. Against the backdrop of poor living conditions for large parts of the society after more than a decade of economic stagnation, the large Afghan population came to be viewed negatively, while an increasingly hostile public debate and media coverage scapegoated them for various economic and societal problems.
This prompted the Iranian government to take two major steps: first, to build a wall along the mountainous and difficult-to-control border with Afghanistan to curb further inflows, and second, to accelerate the repatriation of a total of 1.3 million Afghans in 2024. In 2025, it plans to increase this number to as many as 2 million.[17] In Afghanistan, this is likely to aggravate the humanitarian situation. The consequences of these measures for Europe are difficult to predict. On the one hand, the increasing pressure on the Afghan population in Iran raises the potential for secondary movements towards Türkiye and the EU. On the other hand, enhanced border control measures and individuals' limited financial resources to pay for the services of people-smuggling networks make such movements more challenging. As a result, it is quite possible that the number of new arrivals of Afghans in the EU this year will be the same as last year or even fall further.

17 von Hein, S., Iran plans to deport 2 million Afghan refugees, DW Politics, 14 September 2024, accessed 4 January 2025, https://www.dw.com/en/iran-plans-to-deport-2-million-afghan-refugees/a-70201549

Syria

The unexpected fall of the Bashar al-Assad regime at the end of November 2024, marking what was perhaps the most significant geopolitical event of last year, was largely unexpected. It is still too early to fully assess the multifaceted consequences of the regime change, but it is likely to have profound implications for mobility dynamics and migration policymaking in 2025 (for a detailed analysis of potential migration-related outcomes in 2025, see page 69). The Syrian civil war, which began in 2011, sparked one of the largest protracted displacement crises since the end of the Second World War. More than 14 million Syrians have been displaced since 2011, 7.2 million of them internally. 70% of the IDP population is in need of humanitarian assistance and 90% live in poverty. The rapid escalation of the Gaza conflict after October 2023 and Israeli strikes on Lebanon once again led to a surge in forced displacement out of and into Syria. In the first eight months of 2024, UNHCR recorded the return of over 34,000 Syrian refugees; after the escalation of the situation in Lebanon in late September, this number increased dramatically to an estimated 320,000 returns.[18] In Lebanon, a country facing a severe multifaceted crisis while also hosting 1.5 million Syrian refugees, the environment has become increasingly hostile over the last two years, exposing Syrians to greater risks of detention or deportation. Since the Gaza conflict spilled over into Lebanon in September, Syrians have reportedly attempted to return home. Lebanese citizens have also sought refuge in Syria, with reports indicating that approximately 75,000 have actually crossed the joint border. This influx has put shelters under even more strain, exacerbating the severe shortages of food, hygiene products and adequate sanitation in Syria.[19]

18 UNHCR, Global Appeal 2025, Syria, accessed 4 January 2025, https://reporting.unhcr.org/sites/default/files/2024-11/Syria%20Situation%20Overview%20v4.pdf
19 Romdhane, W. B., Vallentine, J. and Frouws, B., Lebanon's escalating conflict: what are the displacement and migration consequences?, Mixed Migration Centre, 10 October 2024, accessed 5 January 2025, https://mixedmigration.org/lebanon-conflict-displacement-migration-consequences/

In the most recent analysis at the time of writing, UNHCR reported at total of 195,200 people who had returned to their homes between December 2024 and mid-January 2025.[20] It is virtually impossible to make reliable forecasts about Syrian migration in 2025 due to a variety of factors, including the persistent violence in the region, which has made Syria a haven for refugees from Lebanon, the uncertainty surrounding Syria's political and economic future, and the overall security situation coupled with increased pressure in major regional and European host countries to return Syrians to their homeland. Scenarios range from stable or slightly declining numbers to rising levels of voluntary or forced returns, or even a new wave of displacement if the fall of the previous regime does not lead to a peaceful and inclusive transition. In the EU, Syria once more accounted for the highest number of applicants in 2024 (making up 13.0% of all applications) but the overall numbers decreased considerably.
In the first 10 months of the year, the Member States recorded a total of 130,967 applications submitted by Syrian nationals, equating to an 11.9% decrease compared to the same period in 2023. It remains to be seen whether this trend will continue in 2025 as well.

20 UNHCR Core, Syria governates of return overview, as of 16 January 2025, accessed 19 January 2025, https://x.com/FilippoGrandi/status/1880597541462638931

Gaza

According to the UN, at least 44,786 Palestinians have been killed in Gaza since the start of the war in October and 106,188 injured. An estimated 1.9 million people, representing 90% of the population, have been displaced since October 2023[21] due to evacuation orders, bombardments or access restrictions for certain areas, many of them several times.[22] To date, military actions have destroyed or damaged approximately 60% of buildings, 57% of agricultural land and 67% of water and sanitation infrastructure. The health system is nearing collapse, around 600,000 children are out of school and poverty is projected to rise to 74.3% in 2024, affecting 4.1 million people, including 2.6 million who were newly impoverished. All of this makes the situation a crisis of "unprecedented emergency".[23] There is no precedent for large-scale numbers of people fleeing from Gaza during conflict or armed clashes, but the degree of destruction and displacement caused by the current war is also unparalleled. The situation, however, is also unprecedented in that the vast majority of those displaced by the fighting have neither the intention nor the opportunity to reach a safe country that could offer them protection or would be willing to do so. Most inhabitants of Gaza would not relocate to another country even if given the opportunity to do so, due to the fear that they may never be able to return to their home territory again. The governments of neighbouring countries, which have often hosted large Palestinian refugee populations for many years or decades, are concerned about the possibility of increased tension with their own citizens, who are increasingly hostile towards foreigners, as well as the risk of the Palestinian–Israeli conflict being imported into their countries. In a recent statement, the Egyptian president underlined these two points when rejecting any

21 United Nations, Press Release SC/15944, 9819th Meeting (AM), 18 December 2024, accessed 5 January 2025, https://press.un.org/en/2024/sc15944.doc.htm
22 Garcés, B. and Porfirione, G., Expulsion with no exit: one year of war in Gaza, Notes internacionals CIDOB 309, October 2024, Barcelona Centre for International Affairs, p. 1
23 UNDP, Gaza war: Expected socioeconomic impacts on the State of Palestine, E/ECSWA/UNDP/2024/Policy brief.2, accessed 5 January 2025, https://documents.un.org/doc/undoc/gen/i24/005/07/pdf/i2400507.pdf

displacement of Palestinians into Egypt "to protect the Palestinian cause from liquidation" but also to defend national security.[24] The announcement of a ceasefire agreement between Israel and Hamas due to come into effect on 19 January 2025 sparked hopes for an end of hostilities. Regardless of further political developments and in view of the large-sale destructions, millions of displaced Gazans will continue to be exposed to a severe humanitarian crisis situation throughout the year. Displacement will be of a prolonged nature and most Gazans will not be able to return to their homes in the near future but also not find refuge abroad. Their current and future fate may also offer insight into what a world without the concept of "international protection" would look like where those displaced by war and violence can no longer reach the territory of a safe country. Without delving into an evaluation of the causes and course of the conflict in Gaza, it can nonetheless be stated that such a world would claim far more lives than violent conflicts already do today, and that the plight and suffering of survivors would increase severely as well.

24 Africanews, Egypt rejects displacement of Palestinians into Sinai or any other place- President El-Sissi, 13 August 2024, accessed 5 January 2025, https://www.africanews.com/2024/04/26/egypt-rejects-any-displacement-of-palestinians-into-sinai-or-any-other-place-president-el-/

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. According to recent IOM data, the country hosts a total of 787,326 migrants, with Sudan (26%), Niger (24%), Egypt (21%), Chad (10%), Nigeria (4%) and Syria (3%) being the most important groups, but it also has to accommodate 106,556 IDPs and a returnee population of 726,396.[25] At the beginning of 2025, the country hosted 79,019 refugees, 73% of them originating from Sudan and another 10% from Syria.[26] Many of the Sudanese arrived after the start of the civil war in Sudan in April 2023, adding to the humanitarian challenges in Libya. The country has always been a central transit country for irregular migration movements and a major departure point for crossings over the Mediterranean to Italy and, to a lesser extent, Greece. This assessment was confirmed in 2024 based on the nationalities most frequently intercepted on this route, with Bangladesh leading with 20.9% of detections, followed by Syria (18.9%), Tunisia (13.3%), Egypt (6.5%) and Guinea (5.5%). Secondary movements of members of larger migrant populations in Libya (e.g. Sudan and Egypt, which together account for more than 50% of the overall migrant population) cannot be ruled out either. The overall number of crossings went down drastically in 2024, however, and the substantial decrease in arrivals along the Central Mediterranean Route was perhaps the most notable development in connection with Libya and migration, at least from a European policy perspective. In the first 11 months of 2024, the number of detections along this route decreased by 59% or almost 95,000 cases compared to previous years. Along with the frequently observed annual fluctuations, this development was influenced by a number of factors, including the mobility restrictions imposed by other countries, the deterrent effects of Italy's externalisation plans and the impact of the migration agreements concluded between the EU, Member States and North African

25 International Organization for Migration (IOM), Libya, Displacement Tracking Matrix (DTM), accessed 5 January 2025, https://dtm.iom.int/libya

26 UNHCR Operational Data Portal, Libya, accessed 5 January 2025, https://data.unhcr.org/en/country/lby

partners, and a set of measures taken by Libya itself. Libya signed an agreement with Chad aimed at both regularising and repatriating Chadian migrants, of which some 76,000 reside in Libya; cooperated with the EU and other international partners to facilitate about 14,000 voluntary returns from the country; removed the cost of exit visas for voluntary humanitarian returns; conducted new forced expulsions to Niger;[27] and intensified migration control and anti-smuggling operations.[28] As in previous years, however, there are concerns about human rights, particularly regarding the treatment of migrants in detention, arbitrary arrests, forced labour and torture.[29] The European Commission noted improvements, such as the expansion of UN agencies' access to detention centres and disembarkation points. More needs to be done, however, and the desire expressed by Libya to strengthen cooperation with the EU in the field of migration could present a valuable opportunity to move forward in that direction during 2025.[30] Libya's long-standing political impasse between the UN-recognised Government of National Unity in Tripoli and the eastern-based Government of National Stability, backed by the House of Representatives and the Libyan National Army, will not make things easier. The prolonged stalemate, which has been ongoing since the postponement of the 2021 elections, is both a reflection of and a catalyst for continued political and economic instability, which complicates coherent work on durable migration solutions as well. In conjunction with the volatile situation in key countries of origin of forced migration to and through Libya, such as Sudan and Syria, the fragile political situation could at any time lead to a decline in migration control and a surge in irregular migration along the Central Mediterranean Route. Such sharp swings have occurred in the past and could happen again in 2025.

27 Mixed Migration Centre (MMC), Quarterly Mixed Migration Update: North Africa, Quarter 3 2024, p. 7

28 Letter from the President of the European Commission on Migration ahead of the European Council on 19 December 2024 (7159/EU XXVIII.GP), https://www.eunews.it/wp-content/uploads/2024/12/Letter-from-President-UvdL-on-Migration_EUCO-December-2024.pdf, p. 7

29 Mixed Migration Centre (MMC), Quarterly Mixed Migration Update: North Africa, Quarter 3 2024, p. 7

30 European Union, Presidency, Working Party on External Aspects of Asylum and Migration (EMWP), Overview of the Central-Mediterranean Route – Presidency paper, Brussels, 15 July 2024 (OR. en) 11373/24, p. 9

Algeria, Egypt, Morocco and Tunisia

In many respects, the migration situation in Libya is indicative of the situation in most North African countries. In recent years, they have transitioned from primarily being countries of origin and transit for international migration flows to becoming increasingly important destinations for a mixture of labour migrants, refugees and undocumented migrants. Egypt, for instance, hosts an estimated 9 million migrants[31] and more than 792,000 registered refugees and asylum seekers.[32] The increase of migrant populations on their territories, a tense economic situation and growing anti-immigrant attitudes among sections of the population prompted governments to take a more restrictive stance on migration, with the main aim being to curb irregular arrivals from sub-Saharan countries. By 2023, North African governments had introduced a number of measures targeting migrant populations on their territories and had intensified the enforcement of expulsions and repatriations, mainly of nationals from sub-Saharan countries of origin. This trend continued in 2024. Algeria expelled nearly 20,000 migrants to Niger in the first half of the year. In July, Libya announced a new expulsion campaign targeting 10,000 migrants. Tunisia, Libya and Algeria increased the number of interceptions at sea, mainly involving migrants from sub-Saharan African countries, and figures indicate a resulting reduction in the number of departures, which is confirmed by the statistics on irregular border crossings in the EU. In the first 11 months of 2024, the number of detections along the Central Mediterranean Route, which heads towards Italy and Greece, decreased by 59% or almost 95,000 cases. At the end of December, the Italian government reported a 60% decrease in the number of migrants crossing the Mediterranean to reach Italy. Official figures show that 65,472 migrants arrived on Italian shores between 1 January and 27 December 2024, indicating

31 International Organization for Migration (IOM) Egypt, IOM Egypt estimates the current number of international migrants living in Egypt to 9 million people originating from 133 countries, accessed 6 January 2025, https://egypt.iom.int/news/iom-egypt-estimates-current-number-international-migrants-living-egypt-9-million-people-originating-133-countries

32 UNHCR Egypt, Refugee Context in Egypt, accessed 6 January 2025, https://www.unhcr.org/eg/about-us/refugee-context-in-egypt

a significant drop compared to the 153,677 arrivals during the same period in 2023 and the 101,315 arrivals in 2022.[33] The intensification of control measures is also based on increased cooperation with the EU, resulting in a series of agreements that either explicitly target migration control or financially support related measures within the framework of broader economic cooperation. Agreements have been concluded with Libya, Tunisia and Egypt, and further agreements with Mauritania and Senegal are being considered.[34] The EU recognises the success of these agreements, but also sees a number of shortcomings. On the one hand, the agreements are credited with promoting deeper dialogue and improving migration control; on the other, questions remain about their effectiveness, sustainability and compliance with European human rights standards. For North African partners, concerns arise as to whether these agreements align with their own objectives or if they primarily serve European interests, whether the financial resources provided adequately cover the actual costs, and whether one of their key priorities – facilitating mobility and labour migration for their citizens – is sufficiently addressed. The collapse of cooperation between the EU and Niger is an example of how agreements that primarily focus on control, without measures that visibly benefit the partner's population, are unlikely to be sustainable in the long run. The continued deterioration of the security situation in sub-Saharan Africa, along with the increase in the arrival of refugees and irregular migrants in Tunisia that has already been observed, suggests that the sustained decline in numbers by 2025 is not guaranteed and that the trend could reverse at any time.

33 Wallis, E., Italy: A year of bold policies to curb irregular immigration, Info Migrants, 27 December 2024, accessed 6 January 2025, https://www.infomigrants.net/en/post/61763/italy-a-year-of-bold-policies-to-curb-irregular-immigration

34 Philips, R., EU signs controversial migration agreements in Africa, 21 May 2024, accessed 6 January 2025, https://www.infomigrants.net/en/post/57175/eu-signs-controversial-migration-agreements-in-africa

Western, Eastern and Southern African countries

The number of Africans forcibly displaced by conflict and political instability increased for the 13th consecutive year in 2024. According to the Africa Center for Strategic Studies, the total number of displaced persons in African countries stood at 45 million in 2023, which represents a 14% increase or 5 million more since 2023 and a doubling since 2018.[35] Approximately 35 million, or 77%, of these persons are internally displaced, while 10 million are refugees, asylum seekers, returnees, stateless people or other people of concern. Last year, the largest displacement crises were in Sudan (12.7 million or 26% of the whole population affected), the Democratic Republic of the Congo (8.0 million or 8%), Somalia (5.0 million or 28%), Nigeria (3.9 million or 2%), Ethiopia (3.5 million or 3%), South Sudan (3.4 million or 30%) and Burkina Faso (2.3 million or 10%). Despite the long-term trend of increasing displacement, it should be emphasised that African migration also includes substantial labour migration flows. According to recent IOM estimates, more than 21 million African nationals have migrated abroad in search of employment opportunities, most of them within the African continent, but also to Europe and the Gulf countries. Displacement is fuelled by a complex interplay of factors, including armed conflict and violence at both domestic and international levels, political instability, religiously motivated violence, military coups, economic hardship, limited opportunities for young people, environmental challenges, humanitarian crises, natural disasters, restricted civil liberties and human rights violations. In the Sahel, jihadist insurgency expanded in 2024 with the aim of destabilising the military regimes in Burkina Faso, Mali and Niger. This has led to an escalation of armed conflict, affecting an increasing number of regions and resulting in a rise in casualties and displaced people.[36]

35 Africa Center for Strategic Studies, Conflicts Causing Record Level of Forced Displacement in Africa, 4 September 2024, accessed 7 January 2025, https://africacenter.org/spotlight/conflicts-causing-record-level-of-forced-displacement-in-africa/

36 Armed Conflict Location & Event Data (ACLED), Conflict Watchlist 2025 | The Sahel and Coastal West Africa, Conflict intensifies and instability spreads beyond Burkina Faso, Mali, and Niger, 12 December 2024, accessed 7 January 2025, https://acleddata.com/conflict-watchlist-2025/

However, the main driver for the significant increase in African displacement in 2024 was the conflict in Sudan. Since the start of hostilities in mid-April 2023, 2.5 million people have fled the country, with an estimated 1.1 million going to Egypt, approx. 723,000 to Chad and around 210,000 to Libya.[37] Analysts anticipate that offensive campaigns will continue to cause displacement this year, while the likelihood of peace in 2025 remains low.[38] Last year, the increased restrictions on the mobility of migrants in North African countries and along the Central Mediterranean Route – as outlined in the previous section – forced migrants to turn to alternative options. One of these is the Atlantic or Western Africa Route, which connects Western African countries and the Spanish Canary Islands with points of departure in Guinea, Guinea-Bissau, The Gambia, Senegal, Mauritania and Morocco. In the first 11 months of 2024, detections along this route increased by 19% compared to 2023 and more than doubled in comparison to 2020. Significant increases were reported among migrants from Mauritania (more than 10 times higher than in 2023), Mali (up 760%) and Somalia (up 760%). However, it should be noted that in absolute terms, these numbers are still clearly lower than the figures for the main countries of origin of irregular arrivals and asylum seekers in the EU.[39] It should also be stated that this route is significantly more dangerous for migrants than other routes. The Spanish newspaper La Vanguardia reported, citing IOM and UNCHR as sources, that in the first seven months of 2024, more than 1,500 people died while attempting to reach Europe via this route, noting that unreported cases are probably much higher, indicating that migrants face a 55% higher risk of losing their lives compared to even the most dangerous alternative routes.[40]

37 UNHCR Operational Data Portal, Sudan situation, accessed 7 January 2025, https://data.unhcr.org/en/situations/sudansituation
38 Armed Conflict Location & Event Data (ACLED), Conflict Watchlist 2025 | Foreign meddling and fragmentation fuel the war in Sudan, 12 December 2024, accessed 7 January 2025, https://acleddata.com/conflict-watchlist-2025/
39 Frontex, Detections of irregular border-crossings statistics, preliminary figures for January to November 2024, accessed 2 January 2025, https://frontex.europa.eu/we-know/migratory-map/
40 La Vanguardia, Canary Islands migratory route already claims more lives than the Central Mediterranean, 19 September 2024, accessed 7 January 2025, https://www.lavanguardia.com/mediterranean/

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 UNHCR, 6.8 million Ukrainian refugees were recorded globally in 2024, 6.3 million in Europe and 4.2 million in the EU Member States at the end of October 2024 (for a detailed analysis of potential migration-related outcomes in 2025, see page 77).[41]

Latin and Central American countries

Latin and Central America have long been among the world regions hosting the largest numbers of people displaced both within State territories and across national borders. The dramatic scale of displacement is rooted in overlapping and mutually reinforcing crises in various Latin American countries. Violence, economic hardship, gang activity, insecurity, inequality and human rights violations are driving ever-growing populations to leave their homes in search of safety or opportunities to support themselves and their families.
In 2024, their number increased further, but the trend was less pronounced than it had been in previous years. Between 2023 and 2024, the number of forcibly displaced people rose by another 1.6 million from 23 million to 23.6 million, a 7% increase, including 6.5 million refugees and asylum seekers and 8.3 million internally displaced persons. In 2024, Venezuela was the most important country of origin of refugees and IDPs (with a total of 8.2 million), followed by Colombia (7.5 million), Haiti (1.1 million), Honduras (607,000) and El Salvador (263,000). The countries hosting the largest numbers of refugees and IDPs were Colombia (10.0 million), the United States (4.4 million), Peru (1.7 million), Venezuela (1.5 million), Brazil (964,000) and Mexico (904,000).[42]

41 UNHCR, Ukraine. Global Appeal 2025 situation overview, accessed 30 December 2024, https://reporting.unhcr.org/operational/situations/ukraine-situation
42 UNHCR, Global Appeal 2025, The Americas, accessed 4 January 2025, https://reporting.unhcr.org/operational/regions/americas

In 2025, however, UNHCR expects the number of displaced people in the region to decrease for the first time in more than a decade. This expectation is not based on the assumption that the causes of flight and migration will diminish, but on the belief that the continuation of restrictive measures that have already been adopted will impact the numbers. In 2024, such measures included the partial shutting down of the Darien Gap by Panama's government, curbing irregular movements through the country; increased immigration enforcement in Colombia and deportations in Peru; new restrictions on transit passengers and asylum seekers in Brazil; the imposition of additional visa requirements in Ecuador; and the announcement of taking up deportations on the basis of an agreement between Panama and the United States. The more restrictive approaches adopted by several Latin American and Caribbean (LAC) countries stemmed from domestic political pressure to curb irregular arrivals and reduce the number of undocumented migrants residing in or transiting through their territories. But this objective was also strongly driven by the United States, the primary destination for these migration flows, which prioritised a broad set of measures focused on improving regional cooperation and increasing pressure on upstream governments to address irregular migration at their borders. Under the banner of "safe mobility", the US administration introduced a policy mix aimed at strengthening regional immigration enforcement, creating a more orderly system for border arrivals, expanding legal migration pathways and shifting humanitarian protection decisions away from the border. Thus, it was only in the second half of 2024 that the number of encounters began to decline significantly. This was mainly due to Mexico rounding up and expelling migrants via its southern border and imposing visa requirements on Peruvian nationals, combined with a US presidential proclamation restricting access to the asylum procedure during periods of high border crossings (for a detailed description of potential outcomes of a new US migration policy, see page 53).[43] During his election campaign, the now re-elected President Trump vowed to implement stringent border controls, which included resuming construction of the border wall and allocating additional resources to prevent unauthorised crossings. He also pledged to set in motion mass deportations in the millions, targeting mainly undocumented immigrants from Latin American countries. Regardless of whether these plans can ultimately be fully realised, the new US government is likely to adopt an attitude less interested in political cooperation with Latin American partners and more openly hostile towards unwanted migrants. This will probably lead to a vast increase in the number of migrants stuck in limbo or stranded in a country they only intended to transit through, creating additional social and political tensions in the already overburdened South American countries. It can also be expected that the change in US politics will influence the number of asylum applications submitted by Latin American nationals in the EU in 2025, which – contrary to the generally decreasing trend in applications – had already increased last year for important Latin American countries of origin like Venezuela (up 5.6%), Peru (up 17.9%) and Haiti (up 179.0%).[44] This is a development that is likely to continue in 2025 as well.

43 Mixed Migration Centre (MMC), Quarterly Mixed Migration Update: Asia and the Pacific, Quarter 3 2024, p. 8

44 Eurostat, Asylum applicants by citizenship, age and sex – monthly data (January 2023 to October 2024), accessed 2 January 2025, https://ec.europa.eu/eurostat/data/database

Migration Trends in the EU

Photo by Christian Lue on Unsplash

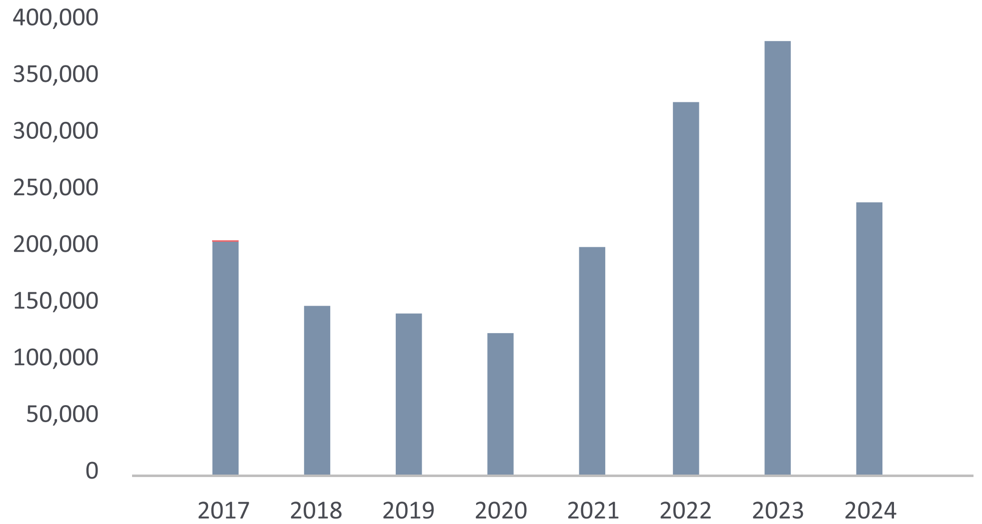
Migration Trends in the EU

An analysis of irregular migration indicators and asylum application numbers in 2024 reveals three cautious conclusions: first, global displacement trends have, for the first time in years, diverged from corresponding numbers in Europe, although the figures remain high; second, the slight reduction in numbers and distinct shift in migration routes suggest that the recently introduced migration policy measures have had an impact; and third, the numerical changes are neither significant nor sustained enough to justify referring to a genuine turning point in the European migration environment.

Detections of irregular border crossings

In 2024, Frontex recorded a total of 239,000 irregular crossings at the external borders of the EU.[45] This figure corresponded to a significant decrease of almost 38% in comparison to 2023 and a decrease of approx. 28% in comparison to 2022. This number is clearly lower than the figures recorded during the last two years, but it still remains above the average totals recorded during the period after the historic peak of the refugee crisis and before the end of the restrictions on movement related to COVID-19 in 2021.

Detections of irregular border crossings in the EU 2017 – 2024

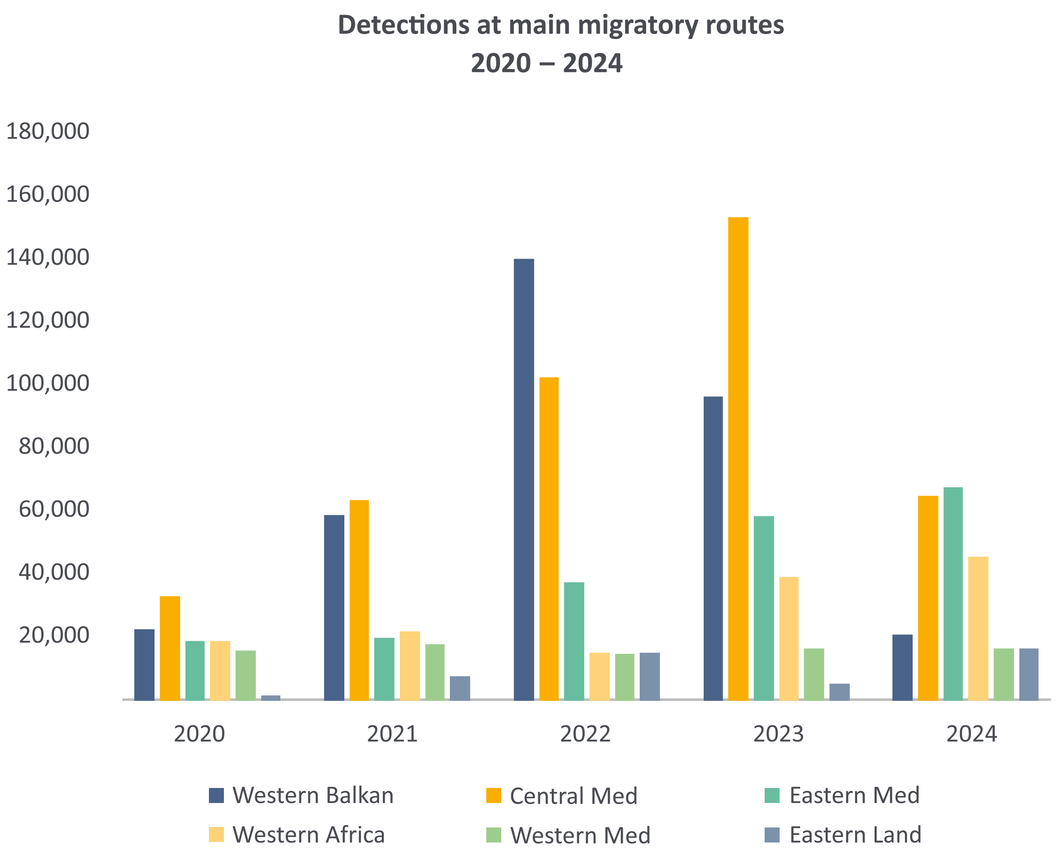


Source: Frontex

The remarkable reduction in overall apprehension numbers was accompanied by a significant redistribution between the main migratory routes of irregular migration. In 2024, the trend observed in 2023 of a shift away from the Central Mediterranean Route and Western Balkan Route towards the Eastern Mediterranean Route continued. On the Central Mediterranean route, the number of detections of irregular crossings decreased by 59% (to a total of 66,766 cases) and by an even more striking 78% on the Western Balkan Route (to a total of 21,520 cases). While approximately 257,000 cases were recorded on these two routes in 2023, the figure for the same period in 2024 had been only about 88,000.

At the same time, the Eastern Mediterranean Route emerged as the most significant region for irregular border crossings into the EU for the first time since the years of the refugee crisis, with 69,436 detections and an 14% increase in comparison to 2023. Significant increases were observed on the Western African Route, with a 18% rise (46,877 cases), and on the Eastern Land Route, which experienced a 192% surge in detections (17,001 cases in total), representing the highest relative increase in irregular crossings in 2024. This development can be attributed to the continued instrumentalisation of migrants, mainly from Syria and Somalia, which was orchestrated by Belarus and Russia, and also to the growing numbers of Ukrainians irregularly crossing into the EU. The observed increase in the number of nationals from sub-Saharan countries apprehended along the Western Africa Route is mainly due to two reasons: first, the continuing destabilisation of the Sahel, and second, the increasingly restrictive attitude of North African governments towards migrant populations on their territories, a trend that took root already last year.

45 Frontex, Detections of irregular border-crossings statistics, preliminary figures for January to December 2024, accessed 15 January 2025, https://frontex.europa.eu/we-know/migratory-map/



Source: Frontex

As in previous years, the migrants and refugees apprehended along the various routes represented a highly heterogeneous group. In 2024, they continued to differ in terms of individual backgrounds, strategies and migration patterns; geographic origins and distances travelled; access to transportation; engagement in primary or secondary movements; availability of funds to organise their journeys; reliance on people-smuggling networks; and varying exposure to entry and border control regimes. Consequently, it can be difficult to make generalisations. Nonetheless, the available data and analyses reveal some broader trends.

In line with the overall trend, the number of detections declined in most major countries of origin. Among nationalities with significant numbers, however, migrants from Ukraine, Mali, Algeria and Bangladesh showed relative increases, although these remained comparatively small in absolute terms. 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 while irregularly crossing a Schengen border. With a total of 35,198 cases, Syria was by far the most significant country of origin for irregular arrivals in the first 10 months of 2024 (most recent data at the time of writing). Almost 16% of all apprehensions recorded last year related to Syrian nationals. At the same time, the number of Syrians detected fell by 43,723 cases, or 44%, representing an even more pronounced decline compared to the overall average. Although in significantly lower overall numbers than Syrians, other apprehended nationalities also originated from crisis regions in the wider neighbourhood, such as Mali (5.7%), Ukraine (4.9%) and Afghanistan (4.8%). Despite the ongoing conflict in Gaza, the number of Palestinians apprehended fell by 35.9% and accounted for only 0.9% of all cases. Significant numbers of detections were also recorded for nationalities not directly linked to war, civil war or violent conflict, such as Bangladesh (5.0% of all cases), or the neighbouring countries of Egypt (3.6%), Algeria (3.3%), Morocco (3.2%), Türkiye (3.2%) and Tunisia (2.9%). Again, it should be noted that in 2024, the number of detections for all these nationalities, apart from Bangladesh, fell by between 5.4% and 56.9% compared to the previous year.

It is likely that the above trends were not caused by a single event or factor, but rather by a combination of several elements that contributed to a significant decline in irregular arrivals. One key factor may be the EU's increased cooperation with its North African neighbours on migration issues. The EU Commission itself views the EU-wide and bilateral agreements and partnerships with countries such as Bangladesh, Egypt, India, Libya, Mauritania, Morocco, Pakistan, Tunisia and the Western Balkans as significant contributors to the overall reduction in irregular arrivals. For example, this cooperation facilitated voluntary returns from North Africa to sub-Saharan Africa, resulting in a two-fold increase compared with the numbers from 2023 and a four-fold increase in comparison to 2021. It also led to a reduction in secondary movements from North African countries to the EU.[46] Improved cooperation with the Western Balkans, particularly in combating people smuggling and trafficking networks and closing loopholes in visa policies, is also believed to have contributed to the observed decrease in irregular arrivals.

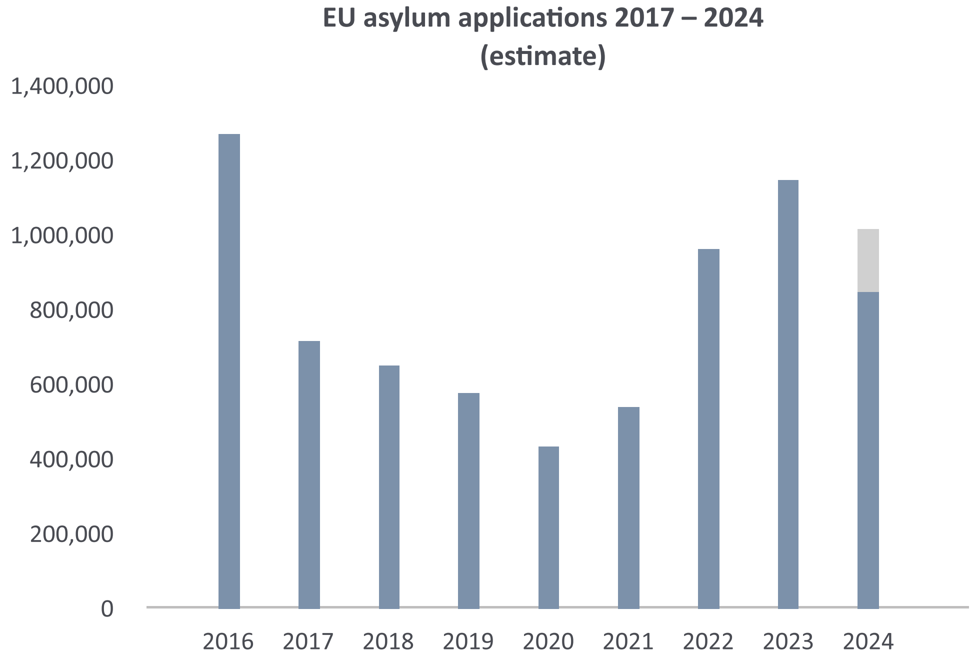
A second reason can be attributed to the deterrent effects of Italy's asylum policy, particularly the memorandum signed with Albania. Although this memorandum was not yet operational in 2024, it is intended to enable the externalisation of asylum processing for certain migrant categories intercepted at sea. This, combined with increased bilateral cooperation with Libya and Tunisia, is believed to have contributed to a 60% drop in arrivals in Italy compared to 2023.[47] Increased controls at the EU's internal borders, such as those in Austria and Germany, are a third factor likely to have had a dampening effect on irregular migration movements. Reinforced control and mobility restrictions in Pakistan, Iran and Türkiye also played a part. Ultimately, certain statistical effects must also be taken into account, which may make the numerical decline appear greater than it actually is. The probability of being apprehended is significantly higher on sea routes than on land routes. The shift from the Central Mediterranean Route to land routes reduces the likelihood of being apprehended, resulting in a decrease in corresponding numbers. While it is impossible to determine the exact size of this effect, it certainly has an impact.

46 Letter from the President of the European Commission on Migration ahead of the European Council on 19 December 2024 (7159/EU XXVIII.GP), accessed 2 January 2025, https://www.eunews.it/wp-content/uploads/2024/12/Letter-from-President-UvdL-on-Migration_EUCO-December-2024.pdf
47 Agenzia Nova, Migrants: Sea arrivals in Italy down almost 60 percent in 2024, 1 January 2025, accessed 2 January 2025, https://www.agenzianova.com/en/news/migrants-sea-arrivals-in-italy-decreased-by-almost-60-percent-in-2024/

Asylum applications in 2024

In the first 10 months of 2024, a preliminary total of 841,472 asylum applications[48] were submitted in Member States of the European Union. This corresponds to a 9.6% decrease in comparison to the first 10 months of 2023 (930,465 applications in total).[49] This figure represents a departure from the previous trend, which had shown an annual increase in the number of applications in the EU after the lifting of restrictions on movement related to the COVID-19 pandemic in 2021. However, it still indicates the second highest year-end figure since 2016. To date, the decrease in asylum applications is less pronounced than the observed downward trend in irregular border crossings. This is probably because asylum statistics tend to lag behind changes in migration patterns and only reflect these changes after a certain delay. The presumed backlog from 2023 resulted in monthly application figures only starting to decline significantly during the summer months (August to October 2024 saw figures 22.4% to 23.3% below the same period in 2023), a trend that is expected to have continued throughout the remainder of 2024. The figures below refer to the most recent country statistics available at the time of writing and illustrate several general trends. However, a final assessment of asylum migration in 2024 will not be possible until the final EU application statistics are available in March 2025.

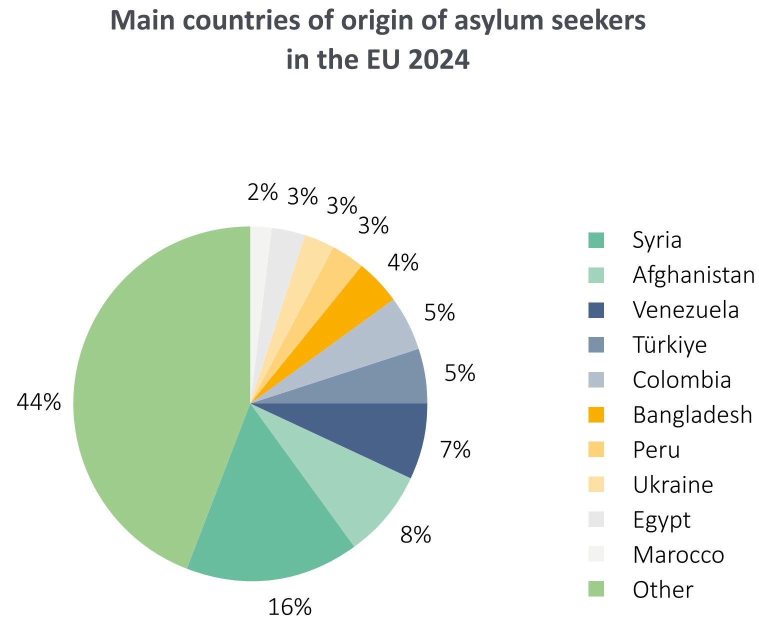
48 Eurostat, Asylum applicants by citizenship, age and sex – monthly data (January 2023 to October 2024), accessed 2 January 2025, https://ec.europa.eu/eurostat/data/database; EUAA (European Union Agency for Asylum), Latest Asylum Trends, accessed 2 January 2025, https://euaa.europa.eu/key-figures-international-protection-in-EU
49 Eurostat, Asylum applicants by citizenship, age and sex – monthly data (January 2019 to October 2023), accessed 2 January 2025, https://ec.europa.eu/eurostat/data/database



Source: Eurostat

In general, the largest applicant groups of 2023 (Syria, Afghanistan, Venezuela, Türkiye, Colombia, Bangladesh and Peru) accounted for the majority of applications in 2024 as well. However, the figures for each nationality displayed varying trends. Syrians submitted the largest number of asylum applications in the EU during the first 10 months of 2024, accounting for 13.0% of all applicants with a total of 130,397 applications. Their overall number had decreased by 11.9%, or 17,643 applications, compared to 2023. Applications from Afghanistan went down even further, decreasing by 28.1% from a total of 94,275 in 2023 to a total of 67,757 in 2024. Syria and Afghanistan led the overall ranking, followed by Venezuela (a total of 59,938 applications, up 5.6%), Türkiye (45,623 applications, down 37.6%), Colombia (43,643,105 applications, down 17.9%), Bangladesh (37,224 applications, up 11.6%), Peru (22,907 applications, up 17.9%), Ukraine (20,844 applications, up 88.0%), Egypt (20,614 applications, down 9.2%) and Morocco (20,515 applications, down 19.2%).

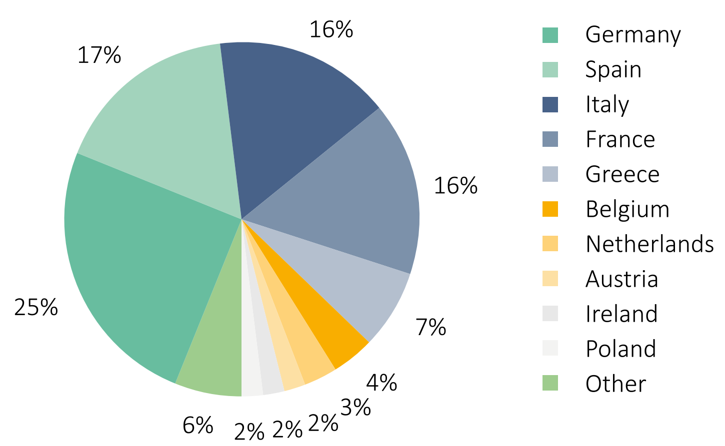
With regard to the main countries of origin for applications, it was evident in 2024 that wars, violent conflicts and extremely harsh living conditions in these countries remained the primary drivers of asylum migration to the EU. Given that a sustainable easing of the global geopolitical situation is unlikely in the near future, the demand for asylum and migration opportunities in the EU will remain high. The effect of political measures implemented by the EU and its Member States that are aimed at reducing overall applications (agreements with neighbouring States, externalisation of asylum procedures, stricter internal border controls and more restrictive visa policies) seems to be becoming apparent in a number of cases (e.g. decreasing numbers for Pakistan, Georgia, Morocco, Egypt, India and Tunisia). However, it is still too early to identify clear trends or draw any definitive conclusions. If the trends from the first 10 months continue, however, the final number of asylum applications for 2024 will be around 1 million in total.



Source: Eurostat

As in previous years, applications concentrated on a minority of EU Member States, with 93.2% of all asylum applications submitted in 10 of them: Germany (a total of 213,440 applications or 25.4% of all applications submitted in the EU), Spain (139,680 applications or 16.6%), Italy (136,109 applications or 16.2%), France (131,791 applications or 15.7%), Greece (58,505 applications or 7.0%), Belgium (32,680 applications or 3.9%), the Netherlands (28,740 applications or 3.4%), Austria (21,250 applications or 2.5%), Ireland (16,643 applications or 2.0%) and Poland (13,490 applications or 1.6%). As in the preceding years, asylum applications disproportionally affected those Member States that were either first countries of entry, in this case Greece located along the Eastern Mediterranean Route, and/or intended final destinations of asylum seekers in the EU. At the same time, a significant majority of 20 Member States recorded declines in the number of applications, most notably Germany (down 75,290 applications compared to 2023 or 26.1%), Austria (down 32,840 applications or 60.7%), Bulgaria (down 8,138 applications or 42.0%), Romania (down 6,622 applications or 75.4%) and France (down 5,709 applications or 4.2%).

Main countries of destination of asylum seekers in the EU 2024

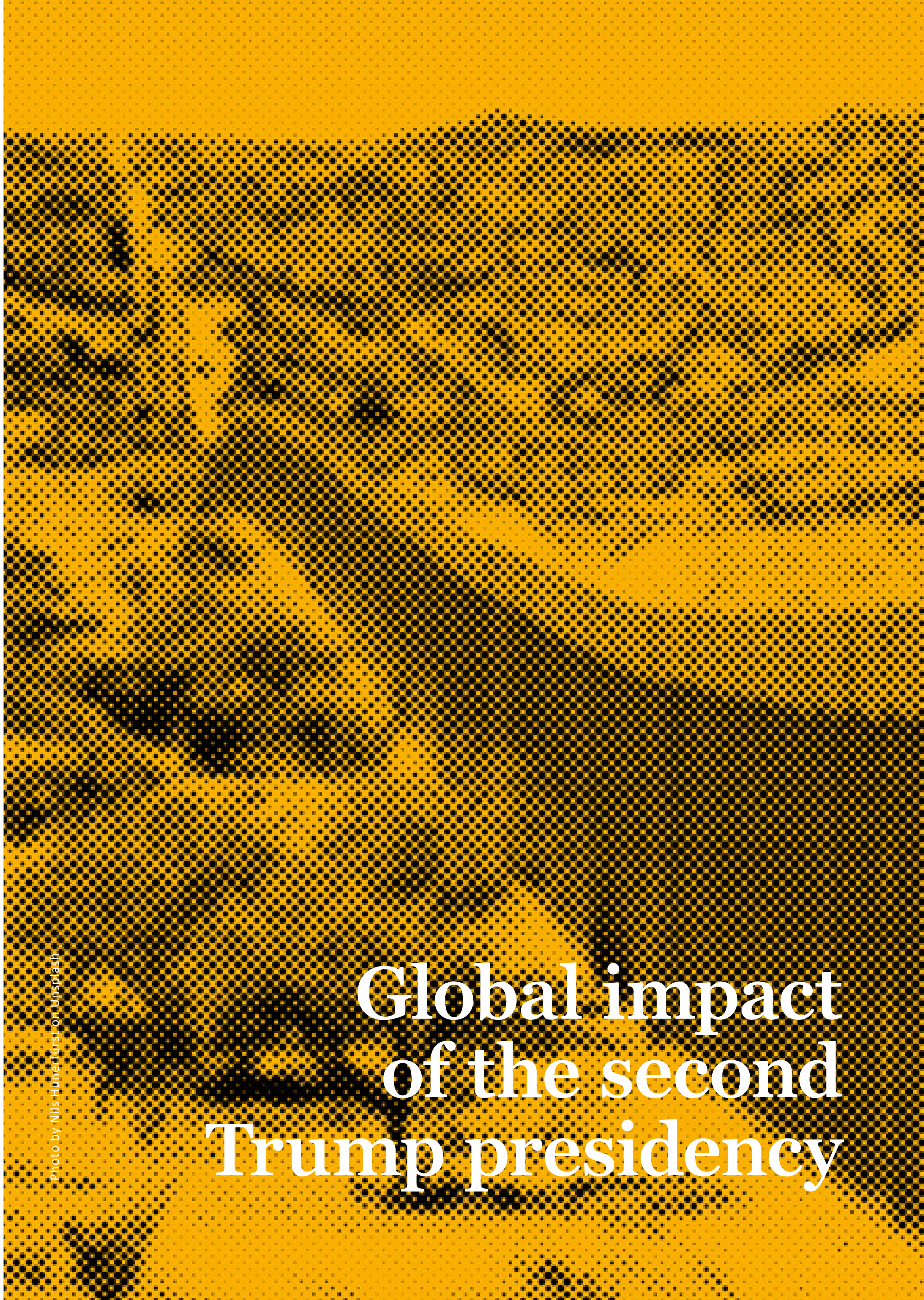


Source: Eurostat

Despite a sharp decline in arrivals along the Central Mediterranean Route, there has been a 23.1% rise in application numbers in Italy, which appears to be linked to the processing of the 2023 backlog. This increase does not reflect individuals who arrived for the first time in 2024, but rather includes in the statistics those who had already reached Italian territory in 2023. The fact that monthly applications remained stable in the first half of 2024, followed by a slight decline in the autumn, supports this interpretation. However, it is likely that some of the new applications in Italy were made by individuals who arrived via the Eastern Mediterranean Route in 2024. The significant decline in applications in Germany and Austria can be attributed in part to stricter policies, such as border controls at internal Schengen borders and announced cuts in support for asylum seekers. These measures are likely to have led to moderate shifts and secondary movements to other EU Member States, including Belgium. A decrease in application numbers does not necessarily equate to a reduction in refugee populations or a reduced need for care and integration. In Germany, for instance, the total number of resident refugees reached a record high of 3.48 million, despite the decline in new applications. Ireland experienced an exceptionally high relative increase in applications, with a rise of more than 60% compared to 2023. This increase is mainly due to secondary movements from the United Kingdom.

An outlook for 2025 must take into account the trends in asylum applications submitted in the EU in 2024 as well as the significant decrease in the number of irregular arrivals detected. If these developments continue, they are likely to lead to even lower year-end figures. However, as stated above, the global and regional geopolitical situation is more volatile than ever. Major events, such as the fall of the Assad regime or the ongoing conflict in Ukraine, could rapidly alter the situation, making it equally likely that the trend of decreasing irregular arrivals could shift, potentially leading to another large-scale arrival or refugee crisis.

Even in the absence of major crises, as seen in previous years, the actual volume of migration will depend on factors such as cooperation with countries of origin and transit, the effectiveness of migration management systems and the impact of policy changes. Last year, there was increased cooperation on migration issues with countries in the neighbourhood and further afield, as well as enhanced control measures within the EU and the development of new policy models focused on the externalisation of asylum processing. These measures appear to have influenced overall trends. It remains to be seen how Member States will continue with, expand or further implement these measures, including progress on the new Pact on Migration and Asylum. Alongside broader geopolitical developments, the progress made will determine the migration figures by the end of 2025.



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Global impact of the second Trump presidency

Global impact of the second Trump presidency

Most observers anticipate that Donald Trump's re-election as US President will lead to significant shifts in American foreign, security, trade and migration policies. Immigration, a central theme in the re-elected president's campaign, played a decisive role in the outcome of the election. During the Biden administration, the proportion of American voters who identified immigration as a top priority increased by 18 percentage points, rising from 39% to 57%. Among Republican voters, this figure was as high as 76%.[50] The incoming administration will therefore feel a strong obligation to deliver on its promises of a much stricter stance on migration. Donald Trump's second term in office raises two central questions for European migration policy: first, whether a change in American policy will impact the size and direction of international migration flows and eventually shift them to Europe, and second, to what extent the prospect of a hardline approach announced by the Trump administration will influence the European debate and increase the pressure on European governments to follow the American model.

But before addressing these two questions, the following section outlines the cornerstones of Trump's proposed migration policy reforms and presents expert opinions on the likelihood of their implementation. During his first term in office, Trump implemented a restrictive migration policy, issuing 472 executive actions aimed at reducing irregular arrivals, enhancing interior enforcement, narrowing eligibility for humanitarian protection and restricting avenues for legal immigration. Some of the most far-reaching announcements did not materialise, such as large-scale deportations and

50 Watson, T. and Zars, J., What to expect on immigration policy from a Trump White House. Five policy areas and three scenarios, Commentary, December 19, 2024, Accessed 25 December 2024, https://www.brookings.edu/articles/what-to-expect-on-immigration-policy-from-a-trump-white-house/

the construction of a wall along the entire US–Mexico border.[51] Others did, however, such as strict immigration enforcement, even if it meant separating families; border measures such as the Migrant Protection Protocols (or "Remain in Mexico" policy), which returned migrants and asylum seekers to Mexico for the duration of their immigration proceedings; the invoking of "Title 42", a COVID-19 public health restriction under which approx. 2.7 million migrants were expelled or rejected at the US–Mexico border[52]; a travel ban targeting individuals from Muslim-majority countries; and attempts to end regularisation programmes for undocumented migrants who came to the United States as children ("DACA programme") or to terminate the temporary protected status (TPS) for the nationals of six countries. The courts blocked or mitigated parts of the initial agenda,[53] and some of the measures, such as Title 42, were continued under the succeeding administration. Although the first Trump presidency did not fully achieve all of its migration objectives, the policies it implemented led to significant shifts towards a more restrictive immigration framework.

These changes had a lasting impact on the system and cemented the idea that preventing unwanted migration is a key indicator of successful governance. The Biden administration took on this challenge but chose a different strategy.[54] Centred on the principle of "safe mobility", it adopted a policy mix focused on strengthening regional cooperation for immigration enforcement, creating a more orderly system for border arrivals, expanding legal migration pathways and shifting humanitarian protection decisions away from the border. It introduced a number of innovative measures, such as humanitarian parole sponsorships, "Safe Mobility Offices" in Central and South American countries, the requirement to use an online app from abroad to schedule an interview with immigration authorities, and the "Los Angeles Declaration on Migration Protection" aimed at promoting shared responsibility and reducing the number of irregular arrivals at the US–Mexico border. Although the number of deportations rose significantly from approx. 600,000 in 2019 to around 1.5 million in 2022,[55] largely due to the expansion of Title 42, the public debate focused primarily on the increase in irregular arrivals. Between 2019, the last year before the COVID-19 pandemic, and 2023, the number of encounters[56] at the US–Mexico border increased from about 852,000 to some 2.48 million.[57]It was only in 2024 that the number of encounters began to decline significantly, a trend largely attributed to increased efforts by Mexico and other Latin American governments to control migration and an executive order issued by President Biden temporarily suspending the entry of non-citizens at the southern US border.[58] However, these tangible effects on migration numbers came too late to sway the election in favour of the Democratic presidential candidate.

During his election campaign, Donald Trump promised to implement stringent border controls, which included resuming construction of the border wall and allocating additional resources to prevent unauthorised crossings. He also pledged to improve interior enforcement and to carry out mass deportations in the millions, targeting not only undocumented immigrants with criminal records but also those without legal status. He aimed to terminate most, if not all, humanitarian protection and regularisation programmes, end

51 Bolter, J., Israel, E. and Pierce, S., Four Years of Profound Change. Immigration Policy during the Trump Presidency, Migration Policy Institute (MPI), February 2022, p. 1

52 Chishti, M., Bush-Joseph, K. and Montalvo, J., Title 42 Postmortem: U.S. Pandemic-Era Expulsions Policy Did Not Shut Down the Border, Migration Information Source, 25 April 2024, Policy Beat, Migration Policy Institute (MPI), accessed 25 December 2024, https://www.migrationpolicy.org/article/title-42-autopsy

53 Carlson, E. and Wheeler, C. (2024), Ten Likely Changes to Immigration Policy Under Trump 2.0., Journal on Migration and Human Security, 12(4), 335-349, accessed 25 December 2024, https://doi.org/10.1177/23315024241274703

54 Fratzke, S., Benton, M. and Selee, A., Legal Pathways and Enforcement: What the U.S. Safe Mobility Strategy Can Teach Europe about Migration Management, Short Reads, December 2024, Migration Policy Institute (MPI), accessed 25 January 2025, https://www.migrationpolicy.org/news/lessons-us-safe-mobility-strategy-europe

55 Isacson, A., 10 Things to Know About the End of Title 42, Commentary, 9 May 2023, accessed 25 December 2024, https://www.wola.org/analysis/end-title-42/

56 "Encounters" include apprehensions, expulsions, turnbacks and permitted entries in limited cases.

57 U.S. Customs and Border Protection, Southwest Land Border Encounters, accessed 25 December 2024, https://www.cbp.gov/newsroom/stats/southwest-land-border-encounters

58 Fratzke, S., Benton, M. and Selee, A., Legal Pathways and Enforcement

birthright citizenship for children born in the United States to non-citizens and revive and expand the travel ban on individuals from certain Muslim-majority countries. Additional measures included imposing tighter restrictions on legal immigration, particularly on family-based immigration and access for low-skilled workers, enforcing stricter asylum laws to deter arrivals at the southern border, and reducing or even fully suspending refugee resettlement in the United States. Finally, and as announced during the campaign, President Trump's return could lead to a redistribution of humanitarian aid funding, shifting resources away from UN agencies and large NGOs towards local responders and faith-based groups. The United States contributes up to 50% or more of the funding for key agencies and programmes such as UNHCR, IOM and the World Food Programme.[59] Potential cuts could affect the ability of these organisations to run critical migration, protection, return and local integration programmes, increasing the volatility of the global migration situation and requiring other major donors to step up funding.

Regardless of whether these pledges can ultimately be implemented and to what extent, they signal a clear paradigm shift from the policies of the previous administration. A holistic approach that combined control measures with the expansion of legal migration channels, embraced innovative solutions, considered migrant rights and interests, and prioritised cooperation with countries of origin and transit is being replaced by a strategy focused primarily on restriction and control. The rhetoric and reality of migration policy will shift,[60] potentially aiming to impose migration goals on countries of origin and transit through aggressive foreign and trade policies. Such tactics are likely because the promised mass deportations cannot be carried out without the cooperation of these countries, which may require substantial political pressure to secure.

59 Loy, I., What could Trump 2.0 mean for humanitarian response? The New Humanitarian, Aid and Policy, Analysis, 7 November 2024, accessed 25 December 2024, https://www.thenewhumanitarian.org/analysis/2024/11/07/what-could-trump-us-mean-humanitarian-response-global
60 Watson, T. and Zars, J., What to expect on immigration policy from a Trump White House

Returning to the questions raised above, what actual impacts might this paradigm shift have on global and European migration realities and policies? First, migration flows might be diverted away from the United States to Europe. In recent years, the number of asylum applications submitted by Latin American nationals represented a significant share of overall applications in the EU. After Trump took office in 2017, these numbers did indeed rise significantly,[61] but this trend continued under the Biden administration as well. Clearly, asylum migration to Europe is influenced by factors beyond US migration policy, including the ongoing deterioration of security and economic conditions in countries of origin as well as the EU's liberal visa policy towards nationals from these countries. Despite this, it can be expected that the measures implemented by the Trump administration will further intensify existing trends in 2025, potentially resulting in an increase in the number of Latin American asylum applications in the EU. Second, and regardless of any quantitative developments, the new US administration's programme will have a considerable impact on the migration policy debate in Europe. It will provide further impetus to those advocating for a similar approach in Europe, pushing for tougher enforcement of expulsions and greater pressure on countries of origin and transit. In recent years, the EU has had positive experiences with agreements with neighbouring States that emphasise economic cooperation and allow for a cautious opening up of labour migration in addition to controlling migration. However, the broad impact of Trump's rhetoric in Europe could put this partnership-based approach under increasing pressure, particularly if he succeeds in carrying out the deportations he has announced. The example of Biden's policy demonstrates that voters are becoming increasingly unwilling to give governments time to implement migration policy goals through comprehensive strategies over extended periods, even if these ultimately succeed. In 2025, European policymakers will closely monitor this development and may focus even more on implementing swift and high-profile measures to curb irregular migration.

61 Between 2018 and 2019, the number of asylum applications submitted in the EU-27 by Colombian nationals increased by 215%, and by Venezuelan citizens by 102%. Eurostat, Asylum applicants by type, citizenship, age and sex – annual aggregated data, accessed 25 December 2024, https://ec.europa.eu/eurostat/data/database

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The search for “innovative solutions” and a European Union focusing on return

The search for "innovative solutions" and a European Union focusing on return

In 2025, the EU and its Member States will focus on implementing the new Pact on Asylum and Migration. However, concerns were already raised last year that the new legislative package fell short in some areas, calling for additional measures to further curb irregular migration. This led to calls for additional "innovative solutions" and "out of the box thinking", which primarily focused on the externalisation of asylum procedures but as a new emphasis also on creating return hubs in third countries, revisions to the Return Directive and the expanded application of the "safe country" concept with a view to externalising parts of the return process.[62] The strengthening of the political right in European elections in 2024 gave these demands additional momentum. They have been included in the manifesto of the European People's Party Group,[63] the largest group in the European Parliament, and the manifesto of the Christian Democratic Union of Germany (CDU),[64] which is expected to form a government after the snap elections in February.

62 EuroMed Rights, "Innovative migration solutions" and comprehensive partnerships with third countries: a debate on the use of the "safe country" concept, its human rights implications and the future of EU Neighborhood Policy, 28 November 2024, accessed 26 December 2024, https://euromedrights.org/publication/innovative-migration-solutions-and-comprehensive-partnerships-with-third-countries-a-debate-on-the-use-of-the-safe-country-concept-its-human-rights-implications-and-the-future-of-eu-neighbor/

63 European People's Party, "Our Europe, a safe and good home for the people", EPP Manifesto 2024

64 Christian Democratic Union (CDU), In Freiheit leben – Deutschland sicher in die Zukunft führen. Grundsatzprogramme der CDU Deutschlands, 15 January 2024, accessed 26 December 2024, https://www.cdu.de/artikel/in-freiheit-leben-deutschland-sicher-in-die-zukunft-fuehren, p. 23

The demands were also raised by 17 EU members and European States in a request to the European Commission to prepare a new legislative proposal for more effective returns and were taken up by European Commission President von der Leyen in a letter sent to EU leaders.[65]

The limited success in enforcing the return of foreign nationals who do not meet the legal conditions for residence is widely viewed as a significant weakness in the European migration system, making improved performance in this area a prerequisite for improving the system as a whole. Thus, the debate often focuses on global return rates as a primary benchmark for evaluating the success or failure of return policies. Return rates have several conceptual weaknesses,[66] but even if their significance as an indicator for the functioning of the return system is debatable, it is hard to avoid the conclusion that annual return figures in the EU are too low to suggest that this system is working well, or to convince voters that it delivers. The most recent data indicate that in 2023, only one in five third-country nationals required to leave the EU was recorded as having done so. The authorities recorded almost 60 different third-country nationalities with more than 1,000 leave orders issued for that year. Actual return rates for these countries fluctuated between 1.5% and 65.2%.[67] Neighbouring countries exhibited both above-average and below-average return rates. Candidate countries with close relationships to the EU demonstrated significantly higher return rates compared to countries of origin that are further away and have less developed ties.

65 Letter from the President of the European Commission on Migration ahead of the European Council on 19 December 2024 (7159/EU XXVIII.GP), accessed 2 January 2025, https://www.eunews.it/wp-content/uploads/2024/12/Letter-from-President-UvdL-on-Migration_EUCO-December-2024.pdf, p. 6

66 In addition to inherent statistical biases, return rates do not account for external factors beyond the control of destination countries such as the composition of countries of origin and changes in political, security or economic conditions that can make returns more or less feasible. Furthermore, return rates do not reflect investments or structural improvements in policies and systems, whose positive statistical impacts may only become apparent in future evaluations.

67 Eurostat, Third country nationals ordered to leave – annual data (rounded) and third country nationals returned following an order to leave – annual data (rounded), accessed 2 January 2025, https://ec.europa.eu/eurostat/data/database

The numbers for Afghanistan (with a return rate of 4.0%) and Syria (with a return rate of 2.7%) suggest that continued violence and a precarious security and economic situation in countries of origin are the biggest obstacles to enabling return and reintegration. Finally, there is a long list of sub-Saharan countries of origin with comparatively low numbers of leave orders and equally low return rates, which, in total, make up a considerable number of non-effected returns as well.

A high rate of implemented return decisions is not only viewed as an indicator of a well-functioning migration regime but is also considered one of the key instruments to discourage migrants from attempting to irregularly enter the EU in the first place. In view of the above, it is hardly surprising that European decision-makers aim to make increasing the number of returns a key priority of migration policy development. What are the specific proposals in this regard, and which could realistically be implemented by 2025?
The debate centres on two main aspects: legislative changes and promoting the externalisation of asylum and return processing. The first aspect refers to finalising the recast of the 2008 EU Return Directive, a task that could not be completed during the adoption of the new pact. Cornerstones of the reform include the mutual recognition of Member States' return decisions, stricter obligations and duties for third-country nationals subject to such a decision, the widening of detention prior to deportation, and the digitalisation and simplification of return procedures. A key point of discussion is how to formulate the "safe third country" (STC) concept in the new directive or whether to continue the "connection criterion". In order for a third country to be considered "safe", existing EU legislation requires it to provide a sufficient level of protection and for there to be "a connection between the applicant and the third country in question on the basis of which it would be reasonable for him or her to go to that country."[68]

68 European Union, Regulation (EU) 2024/1348 of the European Parliament and of the Council of 14 May 2024 establishing a common procedure for international protection in the Union and repealing Directive 2013/32/EU, Article 59(5)(b)

Subsequently, there were disagreements between the CJEU and Member States as to when there is a strong enough connection to justify a return or transfer. Regardless of this debate, most experts agreed that a model like the British Rwanda Plan, which did not require any connection between the migrants and the third country, would not have been compatible with EU law. The new Asylum Regulation requires that the Commission "review the concept of safe third country and shall, where appropriate, propose any targeted amendments" by June 2025.[69] The Commission's report on "targeted amendments" may well lead to the discontinuation of the connection criterion, especially given that the expected change in leadership after the February election is likely to shift Germany's position on the issue.[70]

Such an amendment would also establish a necessary legal precondition for externalising return processes, such as the creation of return centres or hubs outside EU territory. The debate surrounding these centres is not new but it has gained new momentum in the light of the externalisation of asylum processing pursued by the UK's Rwanda scheme and the Italy–Albania memorandum. The idea is to transfer rejected asylum seekers or other migrants obliged to leave EU territory to a (safe) third country and from there to organise the return to their home country, based on the assumption that the risk of being deported to such a centre would deter migrants from attempting to enter the EU irregularly in the first place. Several public statements were made to this effect in 2024, but there was little concrete information about how these centres would work in practice. To date, it remains unclear where such centres should be located; whether they would be based on bilateral arrangements or agreed by the EU as a bloc; whether the return process would be "outsourced" entirely to third countries (similar to the approach of the UK's Rwanda scheme) or managed by one or more EU Member States in an "extraterritorial" setting (similar to the Italy–Albania memorandum); how compliance would be ensured with existing EU legislation and human rights; which migrant categories would fall under the target group and which would be exempt; and what would happen to those who cannot be returned from the hubs to their home countries.

The example of the Italy–Albania memorandum highlights the challenges of implementing such models. Envisaged to be fully operational in the second half of 2024, it has been delayed by various legal and practical difficulties. The Italian government faced legal challenges over its handling of migrants under the safe third country concept and the issue of whether EU law takes priority over national legislation in this regard. This meant that the first groups of migrants who were intercepted at sea and transferred to an Albanian facility for accelerated processing had to be returned to Italy to undergo the standard asylum procedure. The latest development in this context was a ruling by the Court of Cassation, which the government interpreted as supporting its position, leading to the announcement that the Albania plan would resume in January 2025.[71]

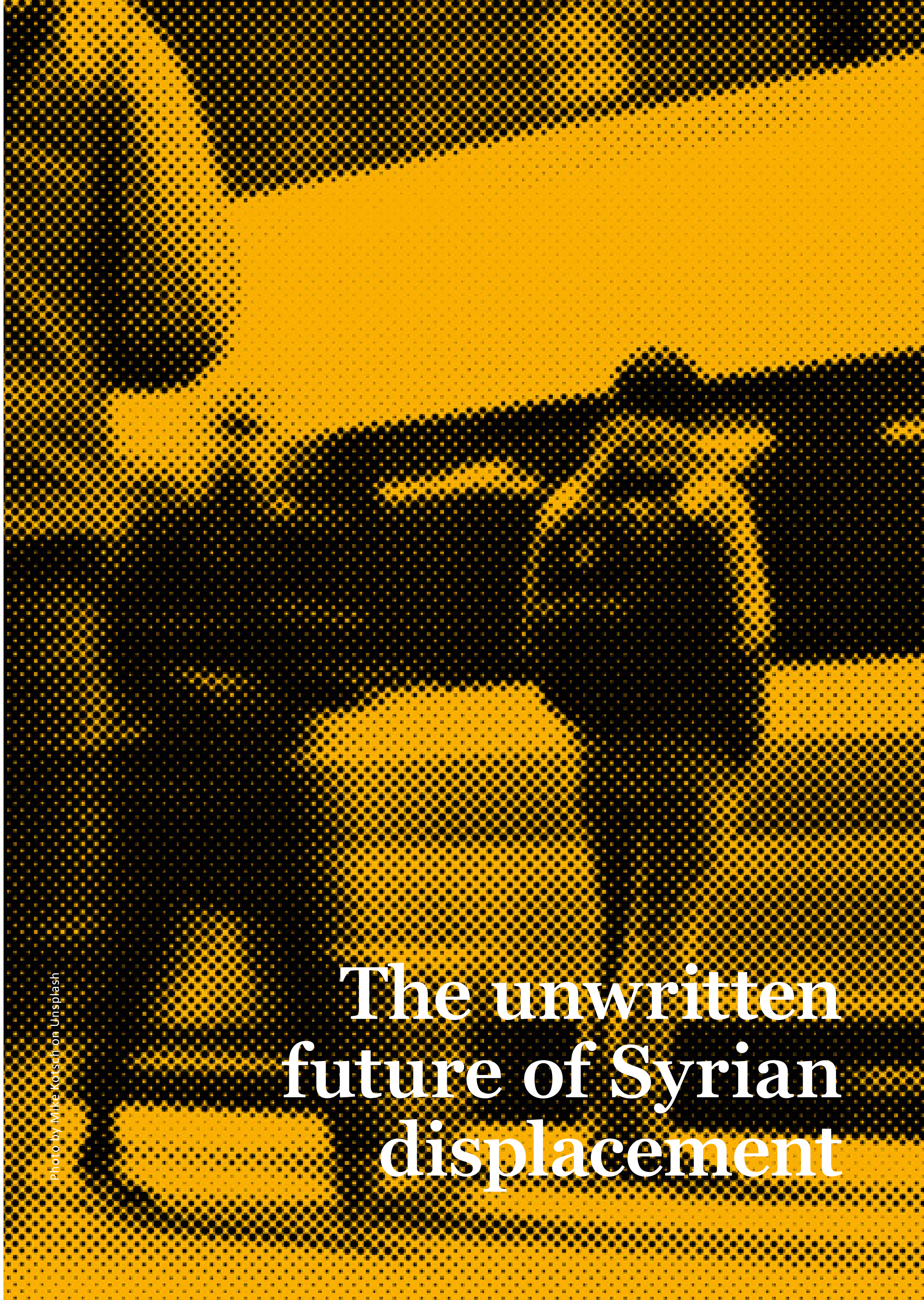
Given the even greater challenges that return hubs are likely to face, it remains to be seen whether such centres can be established and made operational by 2025. However, the idea will remain a political priority, with legal amendments and the discontinuation of the connection criterion creating the necessary legal basis. In practice, the emphasis will perhaps be on the more pragmatic reform proposals such as the mutual recognition of return decisions, the digitalisation of case management systems, clearly defined rights and obligations of returnees, harmonised return counselling standards, the expansion of the accessibility of voluntary return options, enhancing the operational capabilities of Frontex including from third countries, and improving partner country capacity on return, readmission and reintegration, particularly within the EU neighbourhood.

69 European Union, Regulation (EU) 2024/1348, Article 77

70 Thym, Daniel, Safe Third Countries: the Next 'Battlefield', Post 8 of the series of the ODYSSEUS blog on the Pact on Migration & Asylum, accessed 2 January 2025, https://eumigrationlawblog.eu/safe-third-countries-the-next-battlefield/, p. 3

71 Paleologo, F. V., La Cassazione non ha dato ragione al governo: Meloni e Piantedosi verso un altro flop in Albania, 24 December 2024, accessed 2 January 2025, https://www.pressenza.com/it/2024/12/la-cassazione-non-ha-dato-ragione-al-governo-meloni-e-piantedosi-verso-un-altro-flop-in-albania/

A major focus will remain on the "external dimension", namely the negotiation and conclusion of agreements on migration partnerships with neighbouring and other non-EU countries. The existing and developing partnerships between the EU or its Member States and countries such as Libya, Tunisia, Egypt, Mauritania, Morocco, Pakistan and Bangladesh are widely regarded as successful models, including in the context of migration control and return. Consequently, they are likely to remain a cornerstone of the EU's efforts to improve return policies in 2025.



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The unwritten future of Syrian displacement

The unwritten future of Syrian displacement

The unexpected fall of the Bashar al-Assad regime at the end of November marked one of the most significant geopolitical events of 2024, a turning point in the Middle East's political landscape and a major reordering of the balance of power in the region. The regime change is also likely to have a major impact on mobility dynamics and migration policymaking in 2025.
The Syrian civil war, which began in 2011, sparked one of the biggest displacement crises since the end of the Second World War, with Türkiye becoming host to the world's largest refugee population. According to UNHCR, more than 14 million Syrians have been displaced since 2011, and 7.2 million remain internally displaced. The countries hosting the largest Syrian refugee populations are Türkiye (2.9 million), Lebanon (approx. 775,000), Germany (approx. 717,000), Jordan (approx. 628,000), Iraq (approx. 286,000), Egypt (approx. 156,000), Austria (approx. 98,000), Sweden (approx. 87,000) and the Netherlands (approx. 66,000).[72] Onward movements triggered the so-called refugee crisis of 2015, which continues to shape political debate in Europe, but also initiated a historically unprecedented level of international cooperation and migration policy development initiatives. It was perhaps this highly symbolic role of Syrian displacement in shaping perceptions of the global migration situation and its challenges that prompted governments in major host countries to temporarily suspend the processing of Syrian claims for international protection until the situation has stabilised and reliable information on the security and human rights conditions becomes available, but also to initiate a debate on the return of Syrian refugees to their homeland immediately after the fall of Damascus.

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72 UNHCR, Syria Refugee Crisis Explained, 23 December 2024, accessed 2 January 2025, https://www.unrefugees.org/news/syria-refugee-crisis-explained/ and Horwood, C., Frouws, B. and Forin, R., How the collapse of Assad's regime will impact Syria's mixed migration dynamics | Mixed Migration Centre (MMC), 16 December 2024, accessed 2 January 2025, https://mixedmigration.org/how-the-collapse-of-assads-regime-will-impact-syrias-mixed-migration-dynamics/

However, it is evident that, whether desirable or not, achieving this objective will be a challenge. Before the large-scale return of Syrian refugees becomes possible, a number of political, factual and legal issues will have to be resolved.[73] The first major uncertainty is, of course, the immediate and medium-term political development in Syria. The transitional government has repeatedly expressed its intention to pursue a non-violent transition to a stable, peaceful and inclusive political order for all population groups. Thus, it cited "bringing back the millions of Syrian refugees who are scattered around the world" as one of its current main priorities along with restoring security and stability and ensuring essential public services like electricity, food and water.[74] Sectarian conflicts will not be resolved overnight, however, nor will the influence of foreign powers or the catastrophic economic and humanitarian situation. Political transition and the reconstruction of the Syrian State and economy will be long and difficult[75] and it is possible that the regime change could result in new displacement from the country, this time involving members of the old regime or populations that were close to it for political or religious reasons. Historical examples, such as the fall of Saddam Hussein in Iraq and Muammar Gaddafi in Libya or the Taliban takeover in Afghanistan, have demonstrated that if regime change does not lead to more stability and an improved human rights situation, it tends to result in even more displacement.

Economic conditions will be just as important as political developments in shaping migratory movements to and from the country. The economic and humanitarian situation in Syria is more than dire. According to a recent World Bank report, Syria's GDP has decreased by 54% since the start of the conflict.

73 Bick, A., Why Assad's fall took the world by surprise, 20 December 2024, accessed 2 January 2025, https://engelsbergideas.com/notebook/syria-surprise/
74 Nicastro, A., Interview with Mohamed al-Bashir: "We will guarantee the rights of all Syrian peoples. A message to all refugees – we want to bring them back", Corriere della Sera, 11 December 2024, accessed 2 January 2025, https://www.corriere.it/esteri/24_dicembre_11/mohamed-al-bashir-we-will-guarantee-the-rights-of-all-syrian-peoples-a-message-to-all-refugees-we-want-to-bring-them-back-94fcfc9b-a39e-4c94-8e11-d33c8d64cxlk.shtml
75 Pierini, M., Hopes and Uncertainties in Syria | Carnegie Endowment for International Peace, accessed 2 January 2025, https://carnegieendowment.org/posts/2024/12/hopes-and-uncertainties-in-syria, p. 1

Soaring inflation rose by 93% in 2023 alone, while the Syrian pound depreciated by 141% against the US dollar. 14.5 million Syrians or 69% of the population are affected by poverty and 25% by extreme poverty, which was virtually non-existent before the conflict.[76] The EU reports that more than 50% of the population have no access to a stable source of water, 16.7 million people are in need of humanitarian assistance, over 12.9 million people are food insecure, and there are more than 2 million internally displaced people living in camps and informal settlements, most without access to even the most basic supplies and services. 2.4 million children have no access to schools and basic education.[77] Migrant (and refugee) remittances play a crucial role in at least somewhat alleviating the worst effects of the economic and humanitarian crisis. According to the World Bank, these remittances can be associated with "a 12 percentage-point reduction in extreme poverty rates and an 8 percentage-point reduction in poverty rates."[78] Given the high dependency on remittances and the staggering estimates of the cost of rebuilding the country, ranging from 250 billion USD to 400 billion USD,[79] the number of Syrians returning permanently to their home country will be influenced less by their own desire or the intentions of host countries to encourage or enforce return, at least in the short run, and more by the extent to which conditions on the ground enable such returns.

76 International Bank for Reconstruction and Development/The World Bank, Syria Economic Monitor. Conflict, Crises, and the Collapse of Household Welfare, Spring 2024, accessed 14 January 2025, https://documents1.worldbank.org/curated/en/099515505222471242/pdf/IDU12e419274142fc14ff31baf411ef0c0aef81c.pdf
77 European Commission, European Civil Protection and Humanitarian Aid Operations, Syria, updated 18 December 2024, accessed 2 January 2025, https://civil-protection-humanitarian-aid.ec.europa.eu/where/middle-east-and-northern-africa/syria_en#:~:text=16.7%20million%20people%20are%20in,million%20people%20are%20food%20insecure
78 International Bank for Reconstruction and Development/The World Bank, Syria Economic Monitor, p. 32
79 Mroue, B. and Chehayeb, K., Analysis: Syria rebuilding hopes dim as war enters year 13, Associated Press, 15 March 2023, accessed 2 January 2025, https://apnews.com/article/syria-earthquake-assad-rapprochement-conflict-uprising-reconstruction-9de84b45246c8491be020de6b267ae54

In view of the damaged infrastructure, housing shortages and limited economic opportunities, the premature return of a large number of people would strain scarce resources and trigger social and political tensions, potentially leading to violence and even further displacement.[80]

Given these factors, it is difficult to make reliable predictions about developments in 2025. There are various scenarios and conflicting expectations for Syria's political future, ranging from the formation of a democratic government to dictatorial rule by the HTS, a military coup restoring the old regime, or the country's disintegration and fragmentation.[81] The same applies to the areas of displacement, migration and return. UNHCR and other UN partners are preparing for estimates forecasting that 1 million Syrians might return by June 2025; however, they also note that in the final weeks of 2024 alone, an additional 1 million people had been displaced.[82] In a recent analysis, the Mixed Migration Centre also presented a scenario in which returns of Syrian refugees and internally displaced persons (IDPs), as well as new displacements, are likely to occur simultaneously. Additionally, the Centre believes that many Syrian refugees may delay their decision to return until there is greater certainty about the country's long-term stability.[83] This assessment is supported by early experiences in Türkiye, where the number of voluntary returns to Syria increased ninefold after the fall of the Assad regime, reaching an average of approximately 2,000 recorded cases per day and a total of 35,000 by the end of December.

80 Davidoff-Gore, S. and Fratzke, S., The Complicated Reality of Syrians' Return, MPI Short Reads, December 2024, accessed 2 January 2025, https://www.migrationpolicy.org/news/post-assad-returns-syria?eType=EmailBlastContent&eId=744fd60b-f554-4675-be5e-beb10b964753
81 AbuKhalil, A., Six Scenarios for Syria, Consortium News, 29 December 2024, accessed 2 January 2025, https://consortiumnews.com/2024/12/29/six-scenarios-for-syria/
82 United Nations, UN Geneva Press Briefing, 17 December 2024, accessed 2 January 2025, https://www.ungeneva.org/en/news-media/press-briefing/2024/12/un-geneva-press-briefing-3
83 Horwood, C., Frouws, B. and Forin, R., How the collapse of Assad's regime will impact Syria's mixed migration dynamics | Mixed Migration Centre (MMC), 16 December 2024, accessed 2 January 2025, https://mixedmigration.org/how-the-collapse-of-assads-regime-will-impact-syrias-mixed-migration-dynamics/

However, despite high public expectations and growing interest among Syrians in returning, it is believed that the logistical and political complexities, along with security concerns and the deep ties established through life in Türkiye, will make the actual process challenging and time-consuming.[84]

In 2025, governments should prepare for a continued dynamic migration situation, which may include pendulum movements in and out of Syria, temporary and permanent returns, and further displacement. Large-scale durable returns will be difficult to achieve due to the uncertainties surrounding political and security developments as well as the harsh economic and humanitarian conditions on the ground. Consequently, preference might be given to the promotion of voluntary return and/or the organisation of "go-and-see" visits for displaced Syrians to assess whether local conditions would allow them to return without them running the risk of losing their refugee or subsidiary protection status. So far, the European Union has reaffirmed its emphasis on prioritising voluntary returns. The December 2024 European Council stressed the historic opportunity to reunite and rebuild Syria, the importance of an inclusive political process, respect for human rights, non-sectarian governance, and the protection of religious and ethnic minorities. It underlined the need to create conditions for a peaceful political transition, as well as for the "safe, voluntary, and dignified return of Syrian refugees, as defined by the UNHCR".[85] The extent of returns will ultimately depend on access to housing, services and economic opportunities. It will be essential to align measures encouraging return with the various stages of the country's reconstruction, viewing return as a mid- to long-term objective closely linked to rebuilding efforts and embedded in a coherent strategy. This might also be considered when discussing enforced deportations or the cessation of protection status for Syrian beneficiaries. Such proposals may raise expectations among citizens and voters that will be difficult to fulfil because of legal and practical obstacles.

84 ICMPD, Representation of ICMPD in Türkiye, Update on Developments in Syria and their Possible Impact on Türkiye, 16 December 2024
85 European Union, General Secretariat of the Council, European Council meeting (19 December 2024) – Conclusions, Brussels, 19 December 2024 (OR. en) EUCO 50/24 CO EUR 44 CONCL 6, p. 6

Moreover, they can instil fear and insecurity among Syrian beneficiaries about their future in host countries, undermining integration efforts and potentially driving them to hide from authorities or consider moving to another country. If governments adopt entirely different approaches on the matter, secondary movements are likely between countries that start to revoke protection status or implement deportations quickly and countries that initially refrain from such measures. Within the EU, this could lead to significant tensions between Member States, jeopardising the flagship project of implementing the Migration Pact in 2025.

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The need to prepare for different outcomes of the war in Ukraine

The need to prepare for different outcomes of the war in Ukraine

By 24 February 2025, the war in Ukraine will have entered its fourth year. The conflict has claimed over 200,000 lives, with several hundred thousand more wounded. At its peak, the number of forcibly displaced persons amounted to nearly 14 million. By August 2024, 3.7 million people had been displaced within Ukraine, while another 6.8 million, mainly women and children, had sought refuge abroad, including 6.3 million in various European countries.[86]

Since the onset of Russian aggression, Ukraine's population has decreased by over 10 million, including nearly 5 million people living in territories now under Russian occupation, indicating a demographic decline that will affect the country for generations.[87] Poverty in Ukraine has risen by at least 1.8 million, bringing the total to 9 million people. Around 12.7 million individuals require multisectoral humanitarian aid. The conflict has damaged or destroyed approximately 80% of Ukraine's energy infrastructure, causing constant power shortages and exacerbating the energy crisis. Infrastructure destruction and electricity disruptions are expected to limit economic growth to 3.2% in 2024 and 2% in 2025. Overall, Ukraine's GDP remains more than 20% below its 2021 level.[88] Thus, difficult economic conditions and high living costs have also prompted an estimated 120,000 to 130,000 IDPs to return to their homes under Russian occupation.[89]

86 UNHCR, Ukraine. Global Appeal 2025 situation overview, accessed 30 December 2024, https://reporting.unhcr.org/operational/situations/ukraine-situation

87 Diana, M., Amid the war, Ukraine is facing a demographic crisis, 12 July 2024, UNFPA Eastern Europe and Central Asia, accessed 30 December 2024, https://eeca.unfpa.org/en/news/amid-war-ukraine-facing-demographic-crisis

88 European Parliament, EGOV – Author: Drazan Rakic, Two years of war: The state of the Ukrainian economy in 10 charts, Briefing, February 2024, p. 2

89 Hrazhdan, O., Over 100K Ukrainians Return to Russian-Occupied Donbas as Economic Hardship Grows, November 23, 2024, accessed 19 January 2025, https://www.kyivpost.com/post/42704

In 2024, neither side achieved a decisive breakthrough on the battlefield, nor was there significant progress towards meaningful peace negotiations. Analysts largely agree, however, that Ukraine's prospects of achieving a military resolution to the conflict have diminished over the past year. Russia managed to activate additional troops while Ukraine's fighting force was depleting, brought in forces from North Korea, intensified its campaign against Ukraine's energy infrastructure and made incremental yet steady territorial gains.[90] Nevertheless, most experts do not expect a decisive victory on the battlefield for either side, nor the initiation of a process towards a genuine peace agreement, in 2025. The re-election of Donald Trump, who promised during his campaign to end the conflict within a day, introduces additional uncertainties about future developments. Fulfilling this promise could, for instance, involve maintaining American support but making it conditional on Ukraine accepting a ceasefire and at least temporarily relinquishing lost territory. At this point, it is unclear whether the Ukrainian government would agree to such a plan, whether European partners could or would compensate for a potential reduction in US support if it did not, or whether Russia would even be open to any kind of talks to end the hostilities.

Given these significant uncertainties, various scenarios exist for how the conflict could develop in 2025 and beyond. The way in which these scenarios unfold will also lead to different outcomes in terms of migration. A "long war" scenario, a protracted attritional conflict, could see both sides continuing to fight, suffering increasing human losses, while Ukraine attempts to rebuild and promote its inclusion in Western political and security frameworks. Alternatively, an armistice might lead to a "frozen conflict", stabilising the current front lines and territorial shifts without resolving Ukraine's future military status or its goal of restoring its 1991 borders. A "Ukrainian victory", resulting from significantly enhanced Western military support, would push the Russian army back to at least the demarcation line of 23 February 2022.

90 Tenenbaum, E. and Litra, L., Ukraine's Security Now Depends on Europe. A Deal to End the War Must Include Ironclad Assurances, Foreign Affairs, 3 December 2024, accessed 30 December 2024, https://www.foreignaffairs.com/ukraine/ukraines-security-now-depends-europe

Finally, a "Ukrainian defeat" might involve Ukraine accepting Russian terms of surrender after a potential withdrawal of Western support, most likely resulting in a change of government, demilitarisation, neutrality and the de facto partition of Ukrainian territory, including recognition of territorial losses to Russia.[91]

Although all four scenarios are plausible, experts believe that in 2025 a "catastrophic disaster", meaning Ukrainian defeat and/or large-scale annexation of Ukrainian territory, or a "sudden Ukrainian victory" are both unlikely to occur.[92] If this assessment is accurate, the conflict in 2025 will either continue as it did last year, in other words as a protracted attritional conflict, or enter into a temporary ceasefire, most likely without the return of occupied territories to Ukraine. Thus, scenarios relate not just to the future course of the conflict, but also to its impact on displacement, flight and migration. The Prague Process discusses such developments since the start of the war. Its most recent analysis depicts four possible outcomes of the conflict: a protracted war and stalemate on the battlefield; small territorial gains made by Russia; Russian occupation of Eastern Ukraine and an independent Western Ukraine; and full control of occupation of Ukrainian territory by Russia.[93] In the first case (*stalemate*), between 1.2 and 2.1 million Ukrainian refugees could return to their home country. In the second case (*small gains by Russia*), far fewer Ukrainians would return, and a small additional number would find themselves forced to leave. In the third case (*occupation of Eastern Ukraine*), between 6.5 and 12 million could flee to Western Ukraine and other European countries, and in the fourth case (*full occupation*), this figure

91 Lough, J., Four scenarios for the end of the war in Ukraine. Assessing the political and economic challenges ahead, Chatham House Briefing, updated 21 October 2024, accessed 30 December 2024, https://www.chathamhouse.org/2024/10/four-scenarios-end-war-ukraine/scenarios-development-war

92 Pekar, V., Trump and scenarios for Ukraine, 28 November 2024, accessed 30 December 2024, https://global.espreso.tv/russia-ukraine-war-trump-and-scenarios-for-ukraine

93 Düvell, F., Scenarios of War and Forced Migration from Ukraine: How many more Ukrainians could flee if Russia wins? Prague Process Policy Brief, 15 May 2024, accessed 30 December 2024, https://www.pragueprocess.eu/en/news-events/news/955-scenarios-of-war-and-forced-migration-from-ukraine-how-many-more-ukrainians-could-flee-if-russia-wins, p. 12

could rise to as many as 9 to 19 million. As outlined above, the likelihood of such extreme developments is low, but it would be wise for European governments not to rule them out entirely and to prepare for the highest projections of displacement in their plans for 2025. If the conflict in Ukraine takes a very negative turn, European countries may face an influx of refugees on a scale never experienced before.

But even if the conflict situation does not change or deteriorate, Ukrainian migration will be an important issue in the European debate in 2025. By the end of October 2024, a total of 4.2 million Ukrainians were registered in the EU as beneficiaries of temporary protection. Their total number had increased by 98,000 or 1.1% compared to October 2023.[94] At the same time, a total of 620,905 new authorisations for Ukrainian nationals were issued in the EU between January and October 2024, suggesting significant return and pendulum migration.[95] Thus, there was a slight but notable shift in the gender composition. The number of male beneficiaries increased by 7.6%, while the number of female beneficiaries decreased by 2.7%. This indicates an early trend towards family reunification and "solidification" of residence (either in the EU or in Ukraine). Finally, the 2024 trends suggest that the significant levels of immigration and return of Ukrainian nationals seeking protection will continue in 2025, as long as there is no fundamental change to the security situation in the country.

At the same time, the labour market integration of Ukrainian beneficiaries of temporary protection made significant progress. A recent study conducted by the German Institute for Employment Research (IAB) found that employment rates of Ukrainian refugees increased between the last quarter of 2022 and the first quarter of 2024 in 17 out of 19 countries where data were available.

94 Eurostat, Decisions granting temporary protection by citizenship, age and sex – monthly data, accessed 2 January 2025, https://ec.europa.eu/eurostat/data/database

95 Eurostat, Beneficiaries of temporary protection at the end of the month by citizenship, age and sex – monthly data, accessed 2 January 2025, https://ec.europa.eu/eurostat/data/database

In seven countries (Lithuania, United Kingdom, Sweden, Netherlands, Poland and Czechia), employment rates are close to 50% or above, while countries with lower overall rates are also catching up, such as Austria with an increase of 60.8% between 2022 and 2024, Switzerland with an increase of 42.3% and Germany with an increase of 32.5%.[96] These trends suggest that Ukrainian employment does indeed increase with longer periods of residence and is likely to continue to do so, influencing mobility patterns and shaping the political debate on the future of temporary protection in the EU. Against this background, and with the approaching end of temporary protection in 2026, this year might see additional efforts to devise an EU-wide long-term transition plan. Key discussion points could include the transitioning of beneficiaries of temporary protection to national residence permits enabling long-term EU residence, harmonised outreach to inform beneficiaries about their options, and, if conditions allow, EU-wide voluntary return programmes linked to Ukraine's reconstruction. Close coordination with Ukraine will be essential to safeguard its interests, manage return timing and volume, and minimise the strain on infrastructure and social cohesion. If protection is no longer needed, the EU might also consider a permit for circular movement, complementing the visa-free regime and supporting reconstruction and EU rapprochement.

96 Kosyakova, Yuliya & Gatskova, Kseniia & Koch, Theresa & Adunts, Davit & Braunfels, Joseph & Goßner, Laura & Konle-Seidl, Regina & Schwanhäuser, Silvia & Vandenhirtz, Marie, 2024. „Arbeitsmarktintegration ukrainischer Geflüchteter: Eine internationale Perspektive," IAB-Forschungsbericht 202416 (de), Institut für Arbeitsmarkt- und Berufsforschung (IAB), Nürnberg [Institute for Employment Research, Nuremberg, Germany], p. 71

The quietly growing role of labour migration

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The quietly growing role of labour migration

Last year, the public debate focused less on labour migration compared to other policy areas. The trend of its growing importance continued, however, both in terms of figures and its role in migration diplomacy and cooperation with non-EU partner countries. In 2024, the number of work permits granted to non-EU citizens grew by 8.9%, authorisations for seasonal work by 22.6% and the number of EU Blue Cards by 8.8%. Due to the effects of demographic change, this trend is not expected to reverse in 2025, even in the face of a potential economic downturn in the EU. Employment growth might slow down until 2026, but labour demand growth is expected to outpace supply.[97]

At the same time, elements of labour migration and skills partnerships have become firmly embedded in the EU's migration diplomacy and corresponding agreements with non-European partners. The complexity of this policy field will also remain unchanged. A recent mapping identified almost 300 different labour migration pathways across the EU-27.[98] In terms of findings, these pathways have a number of common criteria such as language proficiency, labour market quotas and salary thresholds, but they are still embedded in a patchwork of national labour markets, each with distinct characteristics. The labour migration environment in the EU is highly dynamic and 2024 was no exception, with Member States actively amending legislation and working on the successful operationalisation of recruitment programmes.

97 European Commission, Economy and Finance, Autumn 2024 Economic Forecast: A gradual rebound in an adverse environment, 15 November 2024, accessed 27 December 2024, https://economy-finance.ec.europa.eu/economic-forecast-and-surveys/economic-forecasts/autumn-2024-economic-forecast-gradual-rebound-adverse-environment_en

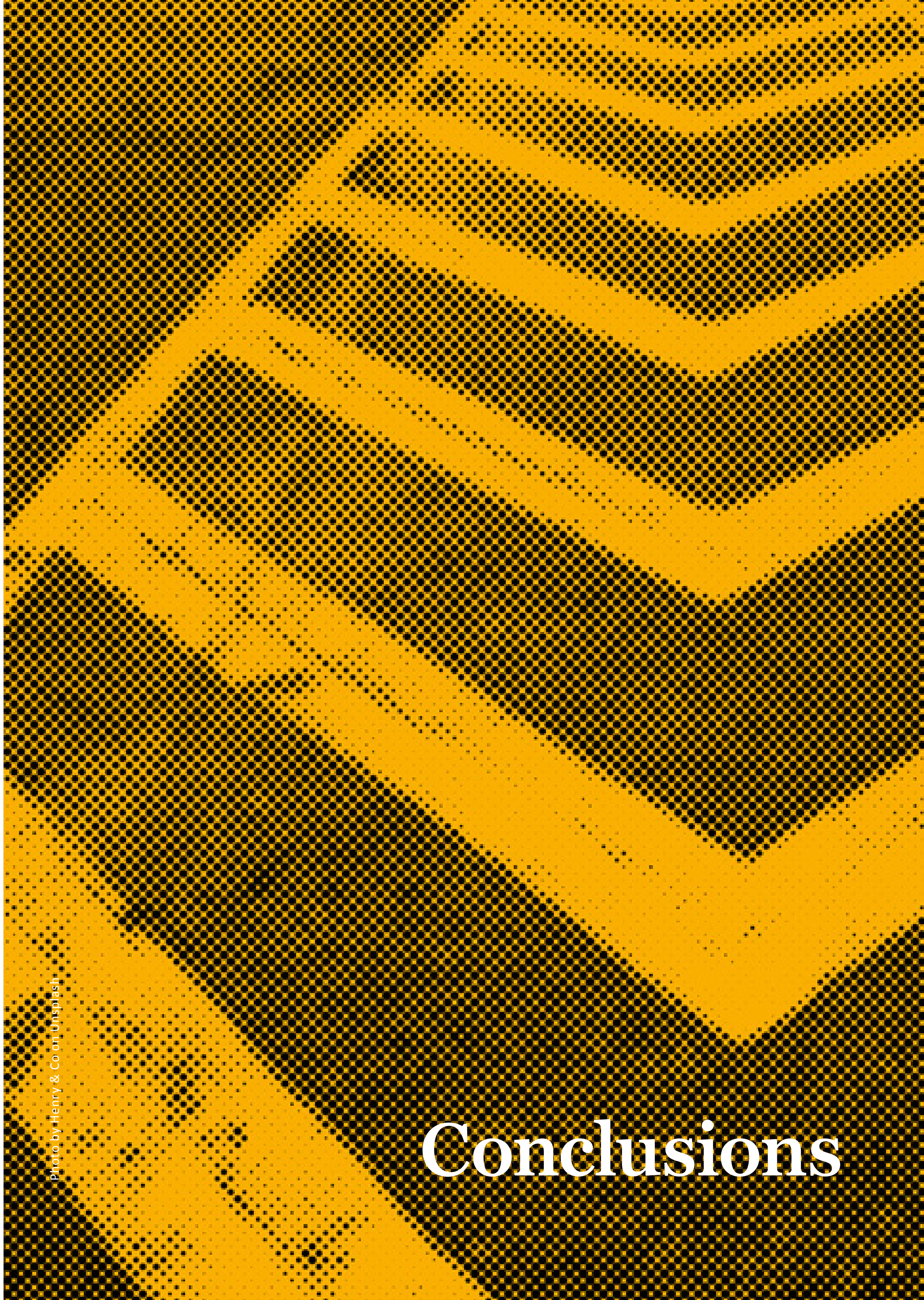
98 ICMPD and Migration Partnership Facility (MPF), Close to 300 avenues to migrate legally for work in Europe: New mapping of labour migration pathways across the EU 27, 11 December 2024, accessed 27 December 2024, https://www.icmpd.org/news/close-to-300-avenues-to-migrate-legally-for-work-in-europe-new-mapping-of-labour-migration-pathways-across-the-eu-27

Pathways derived from EU Directives, such as the EU Blue Card, coexist with nation-specific schemes, including fast-track procedures for certain nationalities and specialised pathways for artists, maritime workers, shepherds and the clergy.

Key sectors driving labour immigration across EU Member States continue to include construction, healthcare and long-term care, agriculture (especially seasonal work), tourism and hospitality, transportation, manufacturing and ICT. Additionally, the dual transition in the green and digital sectors is not only expected to spur growth but also to increase the demand for skilled and highly skilled professionals while exacerbating the existing shortages in these fields. Against this backdrop, EU Member States have developed a wide array of pathways to attract highly skilled talent in recent years, also based on the notion that economic growth will occur primarily in sectors requiring medium- to highly skilled workers rather than those characterised by lower skills. However, this approach may not always fully align with the actual needs of local labour markets, particularly in sectors where workforce shortages are acute. Not every "essential" occupation can also be considered to be "skilled" or "highly skilled". So far, Member States have responded to such demands by distinguishing between labour categories based on the qualifications required. For roles considered to be "low-skilled", they tend to address demand through short-term "seasonal schemes". Italy, for instance, introduced a new system in 2023 consisting of two tiers. The first tier includes a sharp increase in annual quotas for labour migrants along with longer residence permit durations to better attract migrant workers, while the second tier comprises an increase in quotas for seasonal work.[99] It can be expected that several Member States will also start or continue to follow such a two-tier approach in 2025.

99 OECD, International Migration Outlook 2024, OECD Publishing, Paris, accessed 27 December 2024, https://doi.org/10.1787/50b0353e-en, p. 87

The formal recognition of skills and qualifications for workers at medium- to lower-skill levels remains a significant challenge, as does public acceptance that more immigration might be needed in this segment of the labour market too. While an EU-wide mapping reveals that there are structural, persistent and growing labour and skills shortages across all skill levels, political sensitivities often shape admission policies, with stricter rules applied to lower-skilled migrants and far fewer openings in this sector. As the global competition for talent intensifies, the high level of fragmentation of EU labour migration policy and the limited openings for low-skilled yet essential workers will remain a competitive disadvantage in 2025 and beyond.



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Conclusions

Conclusions

State fragility and violent conflict will remain key drivers of migration trends in 2025, as in previous years. By mid-2024, the number of forcibly displaced people had reached an estimated 122.6 million, and this trend is expected to continue. An analysis of the development of statistical indicators on irregular migration and asylum applications in the EU in 2024 reveals three key conclusions: a divergence between global displacement figures and corresponding numbers in Europe; the impact of recently introduced restrictive measures in the EU and beyond; but also a lack of evidence pointing to a genuine trend reversal in the European migration environment. The root causes of displacement persist, both globally and in the European neighbourhood. As a result, governments must be prepared to address a range of migration scenarios in 2025.

A paradigm shift in migration policy under a second Trump administration could divert migration flows away from the United States to Europe and other regions. At the same time, it is likely to influence the migration policy debate in Europe, providing further momentum to those advocating for stricter enforcement of expulsions and increased political pressure on countries of origin and transit. In 2025, the EU and its Member States will focus on the implementation of the new Migration Pact. However, concerns were already raised last year that the new legislative package fell short in some areas, necessitating additional measures to address irregular arrivals. This led to calls for "innovative solutions", which primarily focused on the externalisation of asylum procedures. However, there was also a new emphasis on creating "return hubs" in third countries. Limited success in enforcing the return of foreign nationals is widely viewed as a core weakness in the European migration system. Against this backdrop, European decision-makers will make increasing the number of returns a key policymaking priority in 2025. In addition to a debate on externalisation, the emphasis will be on pragmatic reform proposals such as the mutual recognition of return decisions, digitalising case management, defining returnees' obligations, increasing voluntary return options, extending the role of Frontex and cooperating with partner countries on capacity development.

A major focus will continue to be on the "external dimension", namely on concluding agreements with neighbouring and other non-EU countries. The existing and developing partnerships are widely regarded as successful models, including in the context of migration control, and are likely to remain a cornerstone of the EU's efforts to improve return policies in 2025.

The unexpected fall of the Bashar al-Assad regime was one of the most significant geopolitical events of last year. The regime change is likely to have a major impact on mobility dynamics as well and has already sparked a debate on the potential cessation of protection status for Syrian refugees and their return to their homeland. Achieving large-scale durable returns in 2025 will be challenging, and it may be preferable to encourage voluntary returns. A coherent and coordinated approach among host countries will be crucial in order to prevent secondary movements between countries that quickly revoke protection status or enforce deportations and countries that initially refrain from such measures.

By February, the war in Ukraine will have entered its fourth year. Neither side achieved a decisive breakthrough on the battlefield in 2024, nor was there significant progress towards peace negotiations. With military support from the new US administration potentially reduced, the conflict in 2025 could take various paths, in turn directly affecting displacement, migration and return. Depending on the course of the war, possible developments range from a significant return of people to their homes to another wave of displacement within the country and across borders. It would be wise for European governments to plan for such different scenarios. The labour market integration of Ukrainian beneficiaries of temporary protection made further progress in 2024. Against this background, and with the approaching end of temporary protection in 2026, this year might see additional efforts to devise an EU-wide long-term transition plan. Key discussion points could include the transitioning of beneficiaries of temporary protection to other types of residence permits, ways to allow circular movement, and voluntary return programmes linked to reconstruction. These efforts should always prioritise safeguarding the interests of Ukraine.

In 2024, the public debate focused less on labour migration compared to other policy areas. The trend of its growing importance continued, however, both in terms of figures and its role in migration diplomacy. Last year, the number of work permits granted to non-EU citizens rose again significantly and due to the effects of demographic change, this trend is not expected to reverse in 2025, even in the face of a potential economic downturn in the EU. Elements of labour migration and skills partnerships have become firmly embedded in the EU's migration diplomacy and corresponding agreements with non-European partners, and will continue to do so. The complexity of this policy field will also remain unchanged in 2025, with a myriad of different labour migration avenues available across the EU-27. As the global competition for talent intensifies, this fragmentation will remain a competitive disadvantage.

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The findings, projections, and analyses presented in this report are based on the most recent data and trends available at the time of publication. However, migration dynamics are inherently complex and subject to a range of uncertainties and contingencies, including unforeseen political, economic, environmental, and social developments. As such, the views expressed in this report may not fully reflect future conditions or outcomes. Readers are encouraged to interpret the findings with an understanding of these inherent limitations.

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