ICMPD Migration Outlook 2025

Mediterranean

Eight migration issues to look out for in 2025

Origins, key events and priorities

ICMPD
International Centre for
Migration Policy Development

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Origins, key events and priorities for Europe

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1 Changing patterns in the Mediterranean routes

An analysis of last year's migration data shows that irregular migration flows across the Mediterranean to Europe have plummeted, largely due to a drop in apprehended arrivals on the Central Mediterranean route.[1] This may indicate that the increasingly strict migration policies adopted by many EU Member States, and the partnerships between the EU and its South Partner Countries (SPCs), have started to achieve one of their main intended results, namely discouraging unauthorised people's movements. Nonetheless, the moderate surge of apprehended migrants on the other main migration routes to Europe – particularly across the Atlantic Ocean – and the heightened levels of South-South migration[2] might suggest a more complex scenario: rather than a generalised contraction of irregular movements, regional migration patterns might be following new trajectories in response to the stricter border policies implemented en route. Should this hypothesis be correct, the ability of countries in the region to modulate their policies to the shifting flows is likely to be an important factor to consider in 2025. As the Western routes[3] are increasingly being used by irregular migrants, the role played by Morocco in governing regional migration flows is likely to gain prominence, with a landmark Morocco-EU migration partnership expected in the near future.

1 See the "Migration Trends in the Region" section below.

2 In this paper, "South-South migration" refers to the movement of people between countries of the Middle East and North Africa.

3 The Western routes include irregular arrivals via the Atlantic Ocean to the Canary Islands, via the Mediterranean Sea to mainland Spain and the Balearic Islands, and by land to Ceuta and Melilla in North Africa.

2 The rise of South-South migration cooperation as a strategic opportunity

The ever more difficult journey to Europe – due to the strict border controls enforced along the main routes – coupled with the persistence of the socio-economic and armed conflict-related migration drivers in the Middle East and sub-Saharan Africa[4] is likely to have increased the size of migrant stocks in SPCs in recent years. This increasingly large presence of foreign nationals in the region has given greater prominence to migration issues in political debates and government action. For example, in April last year, the presidents of Tunisia and Algeria, together with the head of Libya's presidential council, convened for an inaugural regional meeting in which they agreed to examine how to coordinate border security and cooperation on migration-related challenges. In addition, Morocco signed an agreement with Côte d'Ivoire to strengthen cooperation on migrant smuggling and trafficking; Libya signed an agreement with Chad aimed at facilitating the regularisation and repatriation of Chadian migrants; and Egypt enacted a comprehensive asylum law designed to manage refugee issues in the face of an exceptionally large influx of Sudanese asylum seekers into the country. These developments highlight the growing tendency for SPCs to assume greater control over their migration governance policies and partnerships, tailoring them to align with local mobility patterns and specific country priorities. Consequently, in 2025, EU policymakers will likely need to adapt their policy efforts – primarily focused on deterring and preventing migration across the Mediterranean – to align with these revised strategies and strengthen the upstream capacities of partner countries. This shift also presents an opportunity for countries in the region to deploy and enhance their skills and resources along migration routes while promoting compliance with international human rights law.

4 See the "Focus Region" section below.

3 Large-scale displacement in Africa

Last year, the number of people displaced by conflicts in Sudan and the Sahel continued on an upward trend. Nearly 3 million people fled Sudan and reached neighbouring countries – with around 683,000 and 64,700 registered as refugees in Egypt and Libya respectively. In addition, an estimated 2 million refugees fled countries in the Sahel, including 86,000 Malians who sought refuge in Mauritania and almost 14,000 Malians who opted to continue their journey irregularly to Europe.[5] With no reasonable prospect of these humanitarian crises ending in 2025, the number of asylum seekers in Africa is likely to continue growing. The increased migratory pressure, compounded by socio-economic struggles, might fuel tensions between the local and migrant populations in SPCs and lead to an increased securitisation of migration narratives and policies.

4 The Middle East conflict and its uncertain impact on migration flows

As the conflict in Gaza persists without a definitive resolution, predicting its long-term impact on migration flows remains challenging. Lebanon's limited capacity to accommodate a significant increase in internally displaced persons (IDPs) resulting from ongoing military actions may lead to cross-border movements into neighbouring countries such as Jordan, Syria, and Iraq, and potentially to Europe via Cyprus and Greece. As the chances of a sustained ceasefire might become more concrete in 2025, the provision of essential protection services to people in need – including medical evacuation to neighbouring countries – and the prioritisation of IDPs' safe return will probably be at the heart of this year's migration cooperation efforts in the region. However, while residents of Gaza have expressed strong resistance to relocat-

5 See the "Migration Trends in the Region" section below.

ing outside the Strip, recent proposals – such as US President Donald Trump's suggestion of resettling Gaza's population – have introduced additional complexities to the migration outlook. Such proposals have met with strong regional opposition, as neighbouring countries fear that large-scale Palestinian displacement could threaten national security and undermine the Palestinian cause. These geopolitical dynamics are likely to shape the region's migration policies and humanitarian responses in the coming year.

5 Shifting sands in Syria

Whilst Syrian refugees continue to be prevalent throughout the Middle East, the sudden fall of the Bashar al-Assad regime might shape new migration dynamics in the region. The regime change is likely to have a major impact on mobility dynamics and has already sparked 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 improved substantially. In addition, the decision by major host countries in the EU (including Cyprus, Greece and Italy) to suspend the processing of claims for international protection submitted by Syrian applicants might incentivise Syrian asylum seekers in Europe to consider returning to their homeland due to the absence of durable solutions in their host countries. Finally, given that the situation in Syria is not fully stabilised, with persistent military actions and severe humanitarian and economic challenges, it cannot be excluded that the regime change will result in new waves of displacement from the country. In light of the above, this year's migration trends in Syria are likely to be fluid and highly salient throughout the region.

6 New partnerships on labour mobility

Although less prominent than other policy areas in public debates, labour mobility appeared to be an increasingly common focus of regional cooperation efforts. For example, last year, Italy and Tunisia signed an agreement to facilitate the entry of Tunisian workers over three years to address workforce shortages in Italy, while Greece and Egypt have started to implement a deal to facilitate the employment of seasonal workers in the agricultural sector in Greece. In addition, elements of labour migration and skills partnerships are expected to be included in the upcoming Morocco-EU migration partnership. Whilst it is important to address workforce shortages in Europe, North-South labour mobility also has the potential to address several priority issues for SPCs. Due to the precarious socio-economic conditions and rising youth unemployment, SPC governments might be inclined to take an increasingly favourable views of using outward migration as a means of relieving pressure on their internal labour markets and offering opportunities abroad to their unutilised workforce. Furthermore, skills partnerships might also stimulate diaspora investments and remittance flows to countries in the Middle East and North Africa, by establishing fruitful connections with respective diasporas in Europe. Efforts to extend and diversify mobility pathways to better reflect the priorities of all countries involved are likely to continue on and represent important aspects of this year's migration cooperation scenarios.

7 A renewed EU focus on the Mediterranean

An important development in last year's regional cooperation was the decision by the new Commission to establish a Directorate-General and a commissioner portfolio exclusively focused on the Mediterranean region. The creation of the new portfolio represents a structural departure from the previous arrangement, in which Mediterranean cooperation fell under the broader remit of the Commissioner for Neighbourhood and Enlargement, and signals a specific strategic interest of the EU

Commission for the region. This change represents an opportunity to move towards a more integrated regional approach from the EU to migration cooperation efforts with SPCs through the announced New Pact for the Mediterranean. Partnerships – including those concluded with Tunisia, Egypt and Jordan and an upcoming one announced with Morocco – provide a clear opportunity to revitalise dialogue and regional cooperation mechanisms and to pursue mutually beneficial border governance imperatives in the wider neighbourhood.

8 "Out-of-the-box" thinking on irregular migration

While implementing the New Pact on Migration and Asylum, which entered into force last year, several EU Member States have advocated for "innovative solutions" to further limit the negative impact of irregular migration in the EU. Most of the suggested innovations are predicated on the transfer of asylum seekers and migrants from the EU to ad-hoc reception centres and "return hubs" in non-EU countries designated as "safe", for the purpose of processing asylum applications and/or implementing return decisions. Whilst efforts in this regard – such as the Italy-Albania Memorandum[6] – have encountered significant legal challenges, the mounting salience of migration in EU political scenarios, fuelled by the strict migration policies adopted by the Trump administration, might reinvigorate proposals for "out-of-the box" solutions in 2025, including in the context of EU's cooperation with SPCs. However, given that the migratory pressure in all SPCs is already high and the capacity of local migration management systems is overstretched, it remains to be seen whether such externalisation proposals will lead to the establishment of specific asylum and return processing facilities in SPCs in the region in 2025.

6 See the Migration Policy Development section below.

Introduction

Introduction

This publication provides a regional perspective on ICMPD's Migration Outlook 2025, delving into key current and emerging migration trends in the Mediterranean region, with a focus on the countries of North Africa and the Middle East. Whilst not attempting to predict the future or cover all relevant trends, the Mediterranean Migration Outlook aims to highlight significant scenarios to consider in 2025 based on recent data and policy developments.

2025 comes at a **crucial juncture for the future of the Middle East**. The regime change in Syria – after more than a decade of armed conflict that led to the displacement of an estimated 14 million people – is likely to have a major impact on mobility dynamics, raising hopes that a gradual return to normal life in the country might finally be on the horizon. At the same time, the uncertain resolution of the Gaza conflict, including its spillover to Syria and Lebanon, points to darker and more complex scenarios characterised by prolonged instability and forced displacement across the region.

Countries in **North Africa have increasingly become the destination of South-South migration patterns** due to limited socio-economic opportunities, climate crises and increasing conflicts in the Sahel and sub-Saharan Africa. As the presence of foreign nationals grows, discontent among the local population emerges due to perceived socio-cultural clashes and competition for limited jobs and resources in times of economic struggles. As a result, immigration has become more prominent in political debates, with governments being progressively more concerned with limiting irregular flows and returning irregular migrants to their countries of origin.

Due to the region's geographic proximity and paramount role in the external dimension of EU policy, the cooperation efforts of the EU and its Member States with Southern Partner Countries (SPCs) are important determinants of migration dynamics in the region. Whilst focused primarily on combating irregular movements, cooperation deals have extended to a wide variety of public policy areas including skills circulation, labour mobility and macroeconomic investments. The different political and socio-economic contexts and varying needs in terms of migration governance capacities across Mediterranean countries will inevitably impact cooperation processes in the region, inviting migration actors to carefully consider the interests, competences and capacities of all partners, and to devise ways to develop them in practice.

Focus regions

Focus regions

North African countries

In recent years, North African countries have transitioned from being primarily countries of origin and transit for international migration flows to becoming increasingly important destinations for mixed flows of international workers, refugees, and undocumented migrants. Egypt, for instance, hosts an estimated 9 million migrants[7], and more than 792,000 registered refugees and asylum seekers'[8], whereas a total of 787,326 foreign nationals were present in Libya last year, with over 79,000 refugees at the beginning of 2025.[9]

The increased presence of migrant populations in North Africa, combined with the tense economic situation in the region, has fuelled negative perceptions of immigration and prompted governments to adopt more restrictive policies' with the main aim being to curb irregular arrivals from sub-Saharan countries. For example, Algeria is reported to have stepped up efforts to return migrants to Niger in 2024; Morocco signed an agreement with Côte d'Ivoire to strengthen cooperation on migrant smuggling and trafficking; and Tunisia increased the number of interceptions at sea, from 21,652 in the first five months of 2023 to 30,281 in the same period last year.[10] These policies have led to a reduction in the number of departures from Africa to Europe, which is confirmed by the overall decrease in irregular crossings in the Mediterranean, driven by a sharp drop (of around 59%) in the number of detections along the Central Mediterranean route last year.[11]

7 IOM (2022).
8 UNHCR (2025), Refugee Context in Egypt.
9 UNHCR (2025), Operational Data Portal, Libya situation.
10 Ben Mbarek, G. (2024).
11 See the "Migration Trends in the Region" section below.

The intensification of control measures has also been based on increased co-operation with the EU, resulting in a series of agreements that either explicitly target irregular migration or embed border control measures within the framework of wider economic cooperation. Agreements have been concluded between the EU, Tunisia and Egypt, whilst others are being considered with Mauritania and Senegal. From the EU's perspective, these agreements are acknowledged for fostering deeper dialogue and improving migration controls across the region, while doubts have been raised about their effectiveness, sustainability, and compliance with international human rights standards. On the part of the SPC, there are concerns whether these partnerships align with local priorities – such as facilitating labour mobility for their citizens – or primarily serve European interests; and whether the financial resources provided adequately cover the actual costs incurred. The example of the collapsed cooperation between the EU and Niger shows that agreements overly focussed on border control and without measures that visibly address the partner's capacity needs and priorities are unlikely to be sustainable in the long run. In addition, the Prime Minister of Libya's Government of National Unity (GNU) recently highlighted how Libya found itself caught between the EU's restrictive migration policies and the persistence of migration drivers in Africa, and advocated for an increased focus on resolving migration issues at source in countries of departure.[12]

As a result of the continued deterioration of the security situation in sub-Saharan Africa, the political impasse between the UN-recognised GNU and the eastern-based Government of National Stability in Libya, the propensity of the local population to emigrate, and the increased presence of refugees and irregular migrants in North Africa, a further decline in migration flows to Europe is not guaranteed.

As such, the current trend of reduced migration to the region could be reversed at any time in 2025.

12 This position was expressed at the Trans-Mediterranean Migration Forum, held in Tripoli on 17 July 2024 and organised by the Libyan Government of National Unity.

Syria

The unexpected fall of the Bashar al-Assad regime at the end of November 2024 is poised to have profound implications for mobility dynamics and migration policymaking in 2025. 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, including 7.2 million Internally Displaced Persons (IDPs) – of whom 70% need humanitarian assistance and 90% live in poverty. The rapid escalation of the Gaza conflict after October 2023 and Israeli strikes on Lebanon led to a surge of forced displacement into and out of Syria, reaching an estimated 320,000 returns at the end of 2024.[13] More than 150,000 Syrians, along with approximately 75,000 Lebanese citizens, have crossed the border from Lebanon into Syria and UNHCR anticipates that up to 1.5 million Syrians will return in 2025. This influx has put additional strain on shelters, exacerbating shortages of food, hygiene products, and the lack of adequate sanitation in Syria.

The persistent violence in the region, uncertainty about Syria's political and economic future, and growing pressure in key regional and European host countries to accelerate the return of Syrians to their homeland all contribute to a complex and unpredictable migration situation in 2025. 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.

Gaza

According to the UN, an estimated 1.9 million people, representing 90% of Gaza's population, have been displaced within Gaza since October 2023 due to evacuation orders, bombardments or access restrictions for certain areas,

13 UNHCR (2025), Global Appeal Syria.

with many individuals experiencing multiple displacements.[14] Thus far, military actions in Gaza 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 estimated to affect 4.1 million people in Gaza and the West Bank.[15] There is no precedent for large-scale numbers of people fleeing from Gaza during conflict or armed clashes, nor for the degree of destruction and displacement of the current war. The situation is also unprecedented in that the vast majority of those displaced by Israel's military actions have neither the intention nor the opportunity to reach a safe country that could offer them protection or would be ready to do so. Most inhabitants in Gaza would not relocate to another country even if given the opportunity, citing concerns about enduring displacement reminiscent of the events in 1948.

The governments of neighbouring countries, which have often hosted large Palestinian refugee populations for many years or decades, are worried about the potential for additional tensions with their own populations, as well as the risk of the Palestinian-Israeli conflict being imported into their countries. In a recent statement, the Egyptian President emphasised two points in rejecting any displacement of the Palestinians into Egypt: protecting the Palestinian cause from liquidation and defending national security. In 2025, Palestinians IDPs will most likely have to remain almost exclusively on the territory of Gaza, where they will continue to face a critical humanitarian situation. Their current and future fate may also offer an 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 judging 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 exponentially.

14 Garcés, B., G. Porfirione (2024).
15 UNDP (2024).

Lebanon

Lebanon is facing a multi layered crisis with grave and increasingly evident humanitarian concerns. The country's severe economic situation – including a 38% loss of gross domestic product between 2019 and 2024 and a peak annual inflation rate of 221% in 2023 – has pushed over 60% of the Lebanese population below the poverty line, with an even greater impact on the refugee population. Furthermore, Israel's ground invasion and airstrikes – most of which took place between October and November 2024 – have struck dozens of towns in South Lebanon, Bekaa and Beirut's southern suburbs. These military actions are estimated to have caused US$8.5 billion[16] worth of damage and displaced at least 1.3 million people. Of these, approximately 562,000 people, primarily Syrian refugees and Lebanese nationals, have crossed the border into Syria.[17]

The dire economic and security situation has led to a moderate increase in irregular boat departures from Lebanon to Cyprus and Italy. However, high costs, cooperation between border control authorities in countries of origin and destination, the limited financial resources of refugees in Lebanon, and the constrained capacity to organise sea crossings by boat limited the overall number of arrivals to Europe via this route last year – at least in comparison to other routes and means of transportation.[18]

Meanwhile, after two years without a competent government and several failed attempts to elect a President of the Republic, on 9 January 2025 the Lebanese Parliament elected army commander Joseph Aoun as President who in turn appointed Nawaf Salam as prime minister.

Whether the newly formed government will be able to bring peace and stability to the country and implement the reforms needed to rebuild an economy

16 World Bank (2024), "New World Bank Report Assesses Impact of Conflict on Lebanon's Economy and Key Sectors".
17 UNHCR (2024), "What is Happening in Lebanon?".
18 See "Migration Trend in the Region" section below.

on the brink of collapse remains to be seen. Overall, the situation in Lebanon remains critical, with widespread poverty, extensive displacement due to the armed conflict, and perceived competition between migrants and locals for limited resources. These factors might continue to drive both the primary movements of Lebanese nationals and the secondary movements of refugees from Lebanon to other locations in the region. The developments in Syria may provide an additional push factor for people in Lebanon and gradually lead to a shift in migration dynamics, with an increased number of Syrians returning home and Lebanese people seeking to improve their living conditions in Syria.

Migration trends in the region

Migration trends in the region

Irregular migration

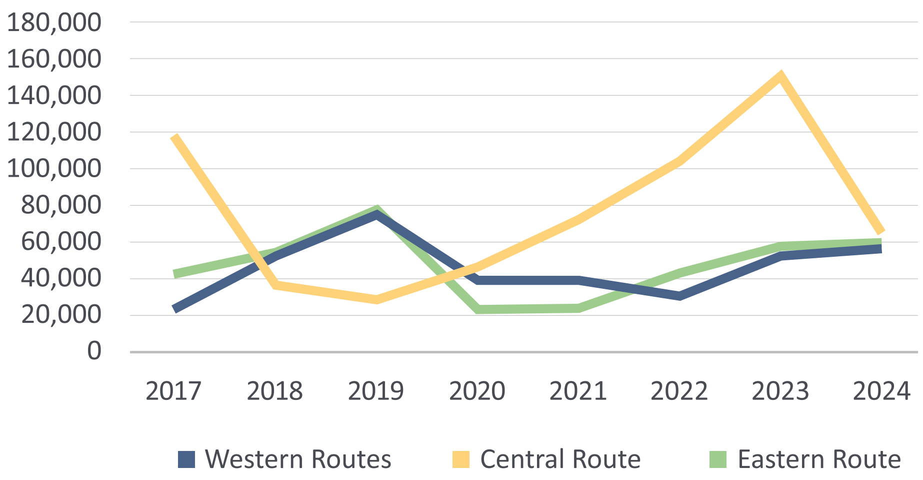
From January to November 2024, over 180,900 migrants reached Europe across the Mediterranean and the Atlantic Ocean irregularly, travelling largely from Türkiye to Greece – via the Eastern Mediterranean route – and from the African coast to Spain – via the Western routes.[19] As Figure 1 below shows, this constitutes a roughly 25% decrease from the irregular entries registered in the same period of 2023, indicating a reversal of the upward trend which started with the easing of COVID-19 related restrictions in 2020, and a return to levels similar to those recorded in 2022.[20] This reduction in irregular migration flows is mainly driven by a **sharp drop in detected crossings on the Central Mediterranean route** – including sea arrivals from Libya/Tunisia to Italy – which have more than halved in number since the previous year and accounted for less than a third of the total number of irregular crossings in the region.[21] The overall trend was partly counterbalanced by a moderate increase in irregular flows on the Eastern Mediterranean and Western routes, which grew by 27% and 30% respectively.[22] Notably, the number of migrants reaching the Canary Islands via the Atlantic Ocean in the first 11 months of 2024 was the highest ever recorded, with over 41,700 detections.[23]

The reasons why far fewer people reached the EU via the Mediterranean last year are likely to bemultifaceted. On the one hand, given that migrants are statistically more likely to be apprehended at sea rather than on land, the shift from the Central Mediterranean sea route to land routes might have

19 EU Council (2024), “Infographic - Migration flows: Eastern, Central and Western routes”; FRONTEX (2024).
20 Ibid.
21 Ibid.
22 Ibid.
23 FRONTEX (2024).

reduced the likelihood of apprehensions, thus also lowering the registered number of irregular crossings.[24] On the other hand, the decline in the Central Mediterranean route may partly be the fruit of intense cooperation between Italy, Tunisia and Libya that focused primarily on introducing strict border governance and return policies in response to last year's heightened migratory pressure. This, coupled with the possible deterrent effect of the Italy-Albania memorandum on extraterritorial migration management, might have pushed many migrants in North Africa to choose alternative routes to Europe – particularly across the Atlantic Ocean – and to seek opportunities elsewhere within the region. In this regard, it should be noted that South-South migration is estimated to have grown significantly in recent years, with some of the largest movements taking place between countries of Africa and the Middle East.

Irregular Arrivals in the EU - Mediterranean and Atlantic Routes (2017–2024)



Source: FRONTEX

24 ICMPD Migration Outlook 2025.

With a slight increase relative to the total number of people crossing since 2023, an estimated 3,387 people died or were reported missing while attempting to reach Europe within the Mediterranean region in 2024.[25] More than 80% of the deaths occurred on the Central Mediterranean and Atlantic routes.[26]

Consistent with previous records, around 61% of all registered irregular maritime migrants were men, 15% were women, and 24% were children.[27] The four most represented countries of origin of irregular migrants apprehended in the Mediterranean region were: Syria (40,256), Afghanistan (16,613), Bangladesh (13,948) and Mali (13,177).[28] These data are partly in line with the trend observed in 2023: the number of Afghani and Bangladeshi migrants remained essentially stable while the number of Syrians continued its progressive growth. This growth started in 2021[29] and is likely to be the result of secondary movements from Lebanon and Türkiye or direct departures from Syria due to the worsening situation there. Conversely, a notable shift occurred with regard to North African countries. In particular, Tunisia experienced a decrease of over 40%, possibly due to the above-mentioned heightened cooperation between the EU and Tunisia on irregular migration, which has helped Tunisia's security and military units to significantly increase the number of migrant interceptions at sea and in coastal areas in recent years (39,926 migrants in 2023, up from 29,723 in 2022 and 23,328 in 2021).[30]

25 IOM (2025), Displacement Matrix.
26 Ibid.
27 UNHCR (2025), Operational Data Portal, Refugee Situation.
28 IOM (2025), Flow Monitoring.
29 Ibid.
30 Global Initiative Against Transnational Organized Crime (2024). It should be noted that the total number of interceptions is likely to be higher, as sources from Tunisia's MoI report that more than 80,000 migrants were intercepted by the GN in 2023: Forum Tunisien pour les Droits Economiques et Sociaux (FTDES) (2023).

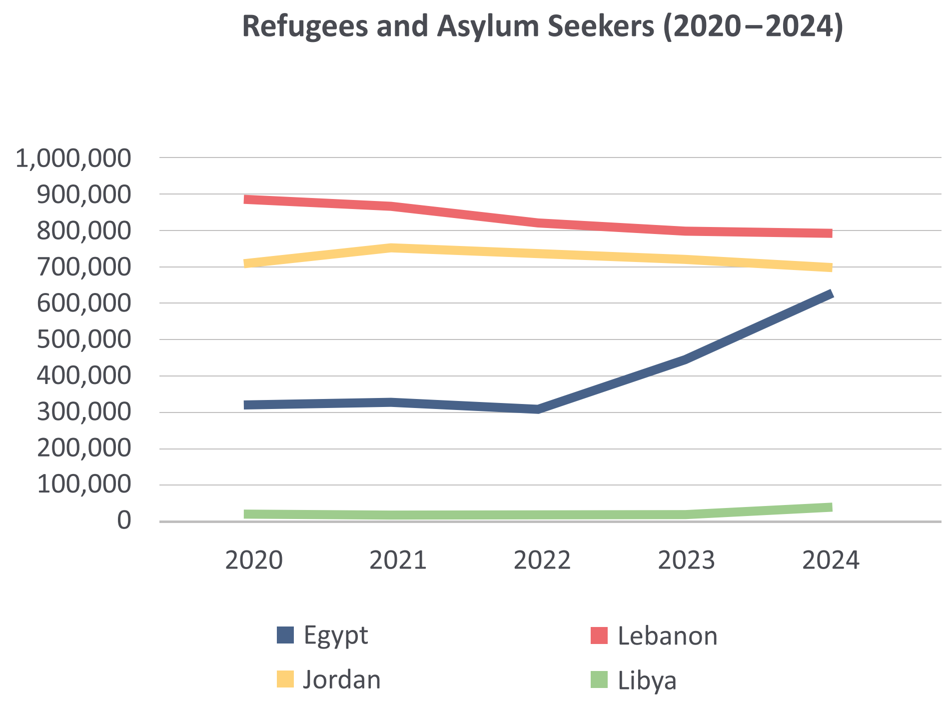
Influx of refugees and asylum seekers

The Mediterranean region continues to host one of the largest concentrations of refugee populations in the world. **The extraordinary influx of refugees and asylum seekers to Egypt continued in 2024**, with numbers rising from roughly 472,700, in 2023, to almost 683,000 at the end of 2024 (see Figure 2 below).[31] This significant increase can mainly be attributed to the protracted armed conflict in neighbouring Sudan, which has resulted in the international displacement of over 3.2 million people, including a total of 541,258 individuals who were registered as refugees in Egypt.[32]

Despite remaining very high in absolute terms, the size of the refugee population in the Middle East, conversely, continued to decrease last year, with the United Nations High Commissioner for Refugees (UNHCR) estimating the number of refugees/asylum seekers in Jordan and Lebanon to be just under 699,000 and 818,000 respectively.[33] This consolidates a downward trend in the region, particularly noticeable in Lebanon, where the number of refugees has fallen by over 20% since 2017.[34] This decrease is likely to be due to the multifaceted economic, political and security crisis experienced by Lebanon and exacerbated by the Israeli military actions in the country, which may have triggered secondary movements of refugees and asylum seekers – including Syrians and Lebanese citizens – to neighbouring countries and beyond. In this regard, whilst Syrian refugees remained prevalent throughout the region, refugee returns to Syria have increased, with around 65,000 returnees registered by UNHCR in 2024. [35]

31 UNHCR (2024), Global Focus, Egypt.
32 UNHCR (2025), Sudan Emergency.
33 UNHCR (2024), Global Focus, Jordan, Lebanon.
34 Ibid.
35 UNHCR (2025), Global Appeal 2025, Syria.

Despite the overall increase in of projected resettlement needs, in the first 10 months of 2024 the number of resettlement departures from Lebanon, Jordan and Egypt fell by 57%, 32% and 31% respectively compared to the same period of 2023.[36]



Source: UNHCR

36 UNHCR (2024), Jordan: Resettlement Dashboard; UNHCR (2023), Jordan: Resettlement Dashboard.

Remittances

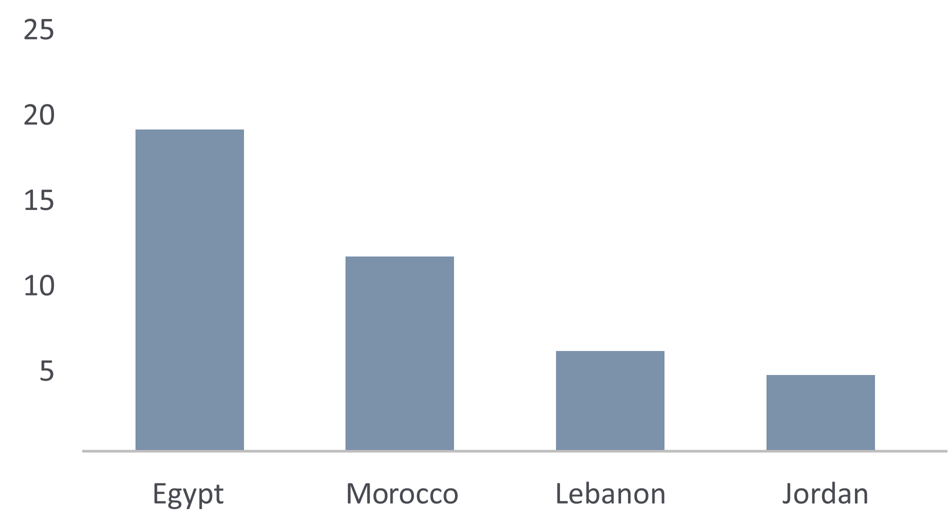
The latest available data on remittances to Middle East and North African countries evidence a fall by 15% decline in 2023, reinforcing the negative trend of recent years.[37] The overall decrease was mainly driven by inflows to Egypt – which declined by around 31% to $19.5 billion – and is likely to be related to the significant gap between the official and parallel foreign exchange rates, which may have encouraged the Egyptian diaspora to use informal remittance channels.[38] Despite the reduction, Egypt remained by far the top recipient in the region (see Figure 3 below) – with links to Egyptians living in countries of the Gulf Cooperation Council (GCC).[39]

Contrary to the general trend, but consistent with the country's upward trajectory in recent years, Morocco has experienced a moderate growth in remittances, which rose by 5.2% to $11.8 billion in 2023.[40] Interestingly, the pace of remittances to Morocco was particularly strong after the earthquake in September 2023, helping to alleviate some of the reconstruction costs and supporting the country's external financial stability.

Money inflows to Lebanon and Jordan – reaching $6.0 and $4.5 billion respectively – have remained substantially stable since 2022.[41]

37 World Bank (2024), "Remittances Slowed in 2023, Expected to Grow Faster in 2024".
38 Ibid., p. 28.
39 Ibid.; GCC countries include: Bahrain, United Arab Emirates, Oman, Kuwait, Qatar and Saudi Arabia.
40 Ibid., p. 29.
41 World Bank (2023), "Remittances Remain Resilient but Are Slowing".

2023 top remittance recipients ($ billion)



Source: World Bank

In 2023, remittances continued to account for a substantial portion of the GDP of several countries in the region, particularly in Lebanon (27.5%), Palestine[42] (18.8%) and Jordan (8.9%).[43] Lebanon and Palestine's economies remained vulnerable to increased pressure on currencies and foreign currency reserves, especially after the regional escalation of the conflict in Gaza.[44]

Finally, despite significant variations across corridors, the cost of remittances in the region decreased from an average of 6.7% (in the fourth quarter of 2022) to 5.9% (in the fourth quarter of 2023), representing the largest decline in total average costs among developing regions.[45]

42 This designation shall not be construed as recognition of a State of Palestine and is without prejudice to the individual position of the ICMPD and the EU Member States on this issue.
43 World Bank (2024), "Remittances Slowed in 2023, Expected to Grow Faster in 2024", p. 29.
44 Ibid.
45 Ibid., p. 8.

Expected migration trends for 2025

The humanitarian crisis in Sudan is expected to continue through 2025, resulting in a potential increase in inter regional movements, particularly to Egypt and Libya. Furthermore, the enduring political instability and deterioration of living conditions in the Sahel countries could drive a greater number of people to move to other countries in the region and, to a lesser extent, to irregularly transit to Europe. Whilst the strict border governance policies and increased cooperation adopted by the EU and its SPCs may further reduce irregular flows via the Central Mediterranean route, the persistence of the above-mentioned migration drivers in Africa may result in a gradual increase in movements across the Western routes. The unification efforts led by the UN and the EU are crucial for Libya's political stability, as a cohesive and functioning government is essential for implementing effective migration management policies that balance security concerns with humanitarian responsibilities.

In the Middle East, the spill-over of the Gaza conflict has caused a large-scale displacement crisis in Lebanon, raising concerns over the country's capacity to cope with an overwhelming rise in the number of acutely vulnerable people. Accordingly, a surge of cross-border movements across the region, particularly from Lebanon to Jordan, Syria and Iraq, is likely. In addition, some Lebanese and Syrians in Lebanon may consider moving to destinations further afield as a viable option to increase their safety and economic perspectives. This might reinvigorate migration flows to the EU through the Eastern route via Cyprus and Greece, although numbers are expected to remain relatively low.

Furthermore, the fall of the Bashar al-Assad regime and the expected improvement of conditions in Syria may lead to an increased number of Syrian refugees and asylum seekers returning to their homeland from the EU and the Middle East. On the one hand, large-scale returns from the EU are unlikely in the short term, given that the situation in Syria is not fully stabilised, with ongoing military actions and severe humanitarian and economic challenges. On the other hand, the number of people crossing into Syria from neighbouring countries, such as Lebanon, is expected to increase due to the deteriorating security and socio-economic conditions faced in host countries. This prediction is supported by UNHCR's latest return intentions survey (conducted in July 2024), which indicates that most Syrians wish to return one day (57%), while identifying safety and security concerns as major obstacles to their return.[46]

Finally, the pace of remittances is expected to increase moderately in 2025, although, this trend may not be uniform across the region. The need for a revamped payment system in Palestine and increased investments in Egypt, as a result of the Ras Al-Hekma partnership agreement with the UAE, are likely to trigger increased money transfers from workers abroad into both Palestine and Egypt. Nonetheless, higher hydrocarbon prices and uncertain regional prospects amid the conflict in the Middle East may slow down remittances to oil-importing countries such as Jordan, Lebanon, Morocco and Tunisia.

46 UNHCR (2024), "Syrian Refugees' Perceptions & Intentions on Return to Syria".

Migration policy developments

Migration policy developments

EU cooperation in the region

Continuing last year's efforts – which led to the signing of a comprehensive Memorandum of Understanding with Tunisia – the EU concluded wide-ranging agreements with SPCs in 2024.

In March 2024, the presidents of the European Commission and Egypt signed a major cooperation deal aimed at curbing irregular migration to Europe's shores and boosting Egypt's economy. As part of this partnership – which was greatly facilitated by the governments of Italy and Greece – the EU announced a €7.4 billion aid package over four years, which encompasses €5bn in concessional loans, €1.8bn in investments, and €600m in grants, including €200m that will be destined to improve migration management. Egypt's government has expressed particular interest in using the agreement to encourage foreign investments and facilitate the engagement of Egyptians residing abroad, presumably in an attempt to boost remittance flows from Europe.

In May 2024, the EU approved a €1bn financial assistance package for Lebanon, brokered by the President of Cyprus. Aside from supporting economic, financial and banking reforms, emphasis was placed on the need to modernise and professionalise the capacity of the Lebanese Armed Forces with equipment and capacity development actions in the field of border management and migrant smuggling.

In January 2025, the EU and Jordan concluded a strategic and comprehensive partnership with a €3bn financial package for Jordan, covering a range of areas including migration, protection and support for refugees. Similar agreements are expected to be concluded or revised in the near future between the EU and other SPCs. In line with the logic of the Pact on Migration and Asylum – which entered into force last year – these cooperation efforts are likely to attempt to link migration-related priorities with other foreign policy areas, including security, economic development, energy, and trade.

In addition, an important development for regional cooperation is the decision by the new Commission to establish a Directorate-General and a commissioner portfolio exclusively focused on the Mediterranean. The action of the appointed commissioner will be guided by a New Pact for the Mediterranean aimed at operationalising the external aspects of EU migration policy, namely bolstering strict border controls, combating human trafficking and establishing comprehensive partnerships with transit countries to counter irregular migration. Other aspects of the new Commissioner's mandate include trade, investment and energy cooperation, largely reflecting the EU's broader strategy of securing energy diversification.

The creation of the new portfolio represents a structural departure from the previous arrangement, where Mediterranean cooperation fell under the broader remit of the Commissioner for Neighbourhood and Enlargement, and signals a specific strategic interest of the EU Commission for the region. However, it remains unclear whether this structural change would lead to a substantial shift towards a more integrated regional approach of the EU in its cooperation efforts with SPCs. In the absence of specific indications to this effect, partnerships – including the announced deal with Morocco – are expected to continue following a bilateral, country-based framework.

Asylum and irregular migration

The large influx of foreign nationals in the region has prompted several governments of EU Member States and SPCs to introduce new policy measures and undertake important reforms and cooperation actions in an attempt to better modulate their response to the migration governance challenges they experience.

In Europe, several countries developed strict policies during the last year to disincentivise irregular migration. Italy, for instance, amended its immigration laws to extend the application of the "safe country of origin" concept to a larger number of countries, including all SPCs in North Africa except Libya. This allowed an increased use of accelerated procedures in the refugee determination process, resulting in an increased rate of manifestly unfounded rejections of international protection claims and related return orders. In addition, in 2023 Italy concluded a memorandum with Albania which enables the transfer of asylum seekers who are nationals of "safe countries" to reception centres in Albania in order to assess their asylum application in border locations outside Italian territory. Despite several legal and practical challenges encountered during its first period of implementation in 2024, Italy's government announced the resumption of the Albania externalisation plan in 2025.

Furthermore, the governments of major host countries of Syrian refugees in the EU (including several Mediterranean countries such as Cyprus, Greece and Italy) decided to suspend the processing of Syrian claims for international protection after the sudden fall of the Bashar al-Assad regime. Such measures are intended to be in place only until the situation in Syria stabilises and reliable information on the security and human rights situation becomes available. Nonetheless, the temporary stop to Syrian claims might also be designed to signal the intention of EU Member States to initiate a debate on the possibility of returning of Syrian refugees back to Syria, whenever feasible.

On the other side of the Mediterranean, the President of Egypt has recently enacted a new "Foreign Refugees Law" (Law No. 164 of 2024), which establishes a comprehensive framework for managing refugee affairs and safeguarding their rights. The new law marks a radical change in Egypt's asylum system: aside from regulating all the most relevant substantial and procedural aspects of asylum, it shifts the responsibility for registering asylum seekers and determining their refugee status away from UNHCR – which has administered Egypt's asylum system since 1954 – to a newly created Permanent Committee for Refugee Affairs tasked with overseeing all refugee-related issues.

Finally, cooperation efforts in the field of irregular migration have intensified among SPCs. The presidents of Tunisia and Algeria, together with the head of Libya's presidential council, convened for an inaugural regional meeting in which they agreed to examine how to coordinate border security and cooperation on migration-related challenges. In addition, in December 2024, Morocco signed an agreement with Côte d'Ivoire to strengthen cooperation on migrant smuggling and trafficking; and, in July 2024, Libya struck a deal with Chad aimed at facilitating the regularisation and repatriation of Chadian migrants.

These developments may indicate the willingness of some SPCs to take greater ownership of their migration governance policies and partnerships in order to shape them according to the characteristics of local mobility patterns and specific country priorities. Some of these attempts have raised concerns about the balance between State national interests and individual human rights. Accordingly, in 2025, EU policymakers will have to adjust their intended policy efforts – which are likely to focus on deterring and preventing migrants from crossing the Mediterranean into Europe – to align with the revised strategies and capacities of their partners, while safeguarding the human rights of the affected migrant population.

Labour mobility

Although less prominent than other policy areas in public debates, labour mobility has appeared to be an increasingly common focus of regional migration policy and cooperation efforts in recent years.

Last year, important partnerships were concluded between Italy and Tunisia, which signed an agreement to facilitate the entry of 12,000 Tunisian workers over three years by simplifying entry procedures and enabling extended stays for Tunisian workers;[47] and between Greece and Egypt, which have started to implement a 2023 agreement to bring 5,000 seasonal workers from Egypt to take up temporary jobs in the agricultural sector in Greece. [48]

47 OECD (2024).
48 Kryeziu, A. (2024).

However, the most numerically significant policy development occurred in Spain, where, in November 2024, the government approved a new regulation designed to regularise about 300,000 migrants per year over the next three years as a means of expanding its labour force in the face of an ageing population. The reform shortens and simplifies the legal and administrative procedures for work and residence permits, allowing migrants to register as either self-employed or salaried workers, and provides them with additional labour rights guarantees.[49]

In addition, elements of labour migration and skills partnerships are expected to be included in the upcoming Morocco-EU migration partnership. Whilst it is important to address workforce shortages in Europe, North-South labour mobility agreements also have the potential to address several priority issues for SPCs, including diaspora engagement and skills circulation. Efforts to extend and diversify mobility deals to better reflect the priorities of all countries involved are likely to continue and represent important aspects of this year's migration cooperation scenarios.

49 Landauro, I., D. Latona (2024).

Conclusions

Conclusions for 2025

The 2025 Mediterranean migration profile is likely to be shaped by the complex interaction of the set of socio-economic, political, security and environmental challenges briefly outlined in this paper.

The numerous armed conflicts in Africa and the Middle East will continue to threaten the stability of the region and put additional strain on the overstretched resources of countries that host a large number of refugees, particularly Egypt, Jordan and Lebanon. As in previous years, "responsibility-sharing" in the context of refugee protection is likely to be an important topic of discussion in migration policy debates. The gradual stabilisation of the political scenario in Syria may also lead to an increased focus – both among of governments of both SPCs and EU Member States – on "returns" as a durable solution for Syrian refugees.

As the climate, security and socio-economic mobility drivers across the region and its neighbours persist, the migratory pressure on SPCs is expected to remain high and a new surge in the number of unauthorised crossings to the EU cannot be ruled out. EU Member States, encouraged by last year's reduction in irregular flows, are likely to continue managing this perceived threat by seeking cooperation deals – either directly or through the EU – with SPCs to deter and prevent migrants from entering Europe irregularly. Nonetheless, the increased presence of migrant populations in North Africa and the Middle East might induce the governments of SPCs to devote more resources to addressing their internal migration-related challenges rather than protecting the EU's external borders. Accordingly, SPCs might seek to diversify their cooperation efforts and increasingly reach agreements with neighbouring countries outside the EU in order to better address their priorities and needs.

In this context, migration will continue to be treated as a potential driver for opportunities related to investment, growth and social mobility. Due to the precarious socio-economic conditions and rising youth unemployment, governments of SPCs might be inclined to take an increasingly favourable view of using outward migration as a means of relieving pressure on their internal labour markets and offering opportunities abroad to their unutilised workforce. Furthermore, skills partnerships might also be used to stimulate investments in strategic sectors and remittance flows to SPCs, by establishing fruitful connections with the relevant diasporas in Europe.

In light of the above, countries in the region are likely to attempt to combine security-oriented measures with broader developmental aspects in their cooperation efforts. Partnerships are expected to continue following a bilateral, country-based framework in which stricter external migration controls will probably be pursued in exchange for multisectoral financial investments. Nonetheless, the success of migration cooperation in the region are likely to depend on the ability of the parties concerned to look beyond short-term solutions with a view to strengthening the overall capacity of countries to tackle the slow-onset processes that shape regional migration drivers.

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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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