ICMPD
International Centre for
Migration Policy Development

ICMPD Migration Outlook 2026

Mediterranean

Seven migration issues to look out for in 2026

Origins, key events and priorities

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Disclaimer: Note on regional context and data limitations

This outlook is based on information available up to February 2026. Several of the contexts covered, including Sudan, Gaza, Syria, and parts of the Sahel, remain highly volatile. In addition, the escalation of armed conflict involving Iran since February 2026 has further heightened instability across the wider Middle East, with direct and indirect impacts on regional security, displacement, and economic conditions.

Early indications point to internal displacement in Iran and movements within the wider region, including cross-border displacement to neighbouring countries. While these developments have not yet translated into significant migration flows toward the EU, they are contributing to increasing pressure on regional host countries. In some cases, renewed displacement has already been observed within the region including movements of Syrian populations from Lebanon since the escalation of hostilities.

However, given the recency of these developments, it is too early to assess their full implications for displacement patterns and migration dynamics. Available data remain preliminary and subject to daily developments as is the trajectory of the conflict – including its geographic scope and duration.

More broadly, in such environments, data on displacement, returns, casualties, and humanitarian conditions may be incomplete, subject to reporting delays, or vary across sources. Migration dynamics and policy responses may also shift rapidly in reaction to security, political, or economic developments.

Seven migration issues to look out for in 2026

1 Mounting regional migratory pressure due to conflict and instability

An analysis of last year's migration trends and data reveals a mixed picture. Irregular migration to the EU via the main Mediterranean routes continued to decline, likely reflecting a combination of factors, including changed dynamics in Syria and tighter border-control and migration-management measures implemented by North African states with EU support. At the same time, migratory pressure has increased across key host countries in both North Africa and the Middle East, driven primarily due to ongoing displacement from Sudan and broader regional instability. With the conflict in Sudan showing no signs of de-escalation and rival factions consolidating territorial control, regional displacement is likely to persist through 2026, though its trajectory remains uncertain. One possible scenario involves the emergence of limited safe areas inside Sudan which, coupled with the continuation of organised return measures in neighbouring countries, may lead to higher levels of internal displacement and return movements to Sudan. Alternatively, growing inflows of Sudanese asylum seekers into neighbouring countries could intensify economic hardship and strain already fragile protection systems, potentially prompting more people – particularly Sudanese and Egyptians – to seek opportunities elsewhere. At the same time, recent developments in Iran have already led to significant internal displacement and early cross-border movements within the region, although large-scale movements further abroad or to Europe have not been observed to date. This, amplified by deteriorating conditions in the Central Sahel, could reinvigorate irregular movements particularly via the Central and Western Mediterranean routes. Recent reports from 2026 point to increase in reported deaths and disappearances along the Mediterranean routes as well as increasing departures from Libya and the emergence of new corridors, including movements toward Greece. This suggests that the observed decline in arrival figures may not fully reflect the humanitarian dimension of migration dynamics nor the continued pressures unfolding within the wider region.

2 Deepened EU–North Africa relations amid migration pressures and labour mobility initiatives

In 2026, the role of North African countries will likely continue to evolve – from being primarily transit countries to becoming both destinations and transit hubs for mixed migration flows. In closer cooperation with the EU, including through expanding migration diplomacy and comprehensive partnerships with key countries along migration routes, North African states are expected to focus not only on control measures and return policies, but also on initiatives related to skills development and labour mobility – such as the recently announced operationalisation of the EU-Egypt Talent Partnership. In terms of migration dynamics, countries in the north and south of the Mediterranean are forming an increasingly interconnected region, marked by shared challenges and opportunities. In this context, both sides will need to address more effectively the root causes of displacement and irregular mobility in Africa if sustainable change in Mediterranean migration dynamics is to become a realistic prospect.

3 Emerging prospects for migration cooperation in Syria

Despite the sizeable return of Syrians from neighbouring countries, conditions inside Syria remain highly fragile. Returnees continue to face the consequences of destruction of housing, damaged infrastructure, limited access to basic services and employment, and persistent insecurity in parts of the country. As several EU host states (including Cyprus and Greece) have begun reassessing international protection claims submitted by Syrian applicants – reflecting changing circumstances and the updated Country Guidance issued by the EU Agency for Asylum (EUAA) – debates over future returns of Syrian nationals and the possible review of protection statuses for Syrian nationals are likely to become highly salient in Mediterranean migration policy discussions in 2026. At the same time, the potential large-scale return of Syrian refugees could significantly affect labour markets in neighbouring host countries, particularly in low-wage sectors that have come to rely on Syrian workers, with possible knock-on effects on household incomes and remittance patterns. Increased cooperation on regional labour mobility, for example, could facilitate the mobility of Syrians to neighbouring countries as migrant workers in sectors facing shortages, while allowing high-skilled workers from Lebanon and Jordan to access employment in Syria – linking labour surpluses with emerging demand in Syrian governorates. However, implementing large-scale returns in 2026 before establishing a viable reintegration ecosystem in Syria risks being counterproductive, as it could exacerbate current humanitarian challenges and potentially fuel new outward migration flows throughout the region. To ensure long-term success, aligning cooperation with national efforts prioritising recovery and reconstruction initiatives could support institutional capacities and strengthen the resilience of Syrian communities, including potential future returnees.

4 A new EU paradigm for Mediterranean cooperation?

Following the establishment of a Directorate-General and a commissioner portfolio exclusively focused on the Mediterranean region in 2024, the European Commission continued the development of a specialised approach to its South Partner Countries (SPCs) by launching, in November last year, the new Pact for the Mediterranean. This instrument is presented as a shift from previous cooperation approaches and is presented as a more co-owned, voluntary framework for cooperation encompassing different areas of public policies such as education, renewable energy and security.

Migration is positioned within the Pact’s third pillar, together with peace and security, disaster preparedness and law enforcement, indicating that it continues to be framed in close connection with wider regional stability dynamics. Notwithstanding, migration and diaspora engagement has the potential to be instrumental to the success of education and skills pathways measures envisaged under the Pact, including the Mediterranean University and vocational training networks, thereby contributing substantially to its ambition to serve as an economic multiplier in the region.

The implementation of the Pact, via an Action Plan to be adopted in 2026, is likely to emphasise an operational and technical approach, focusing on the monitoring and coordinating of activities while building on existing programmes and funding instruments.

2026 will be the first year to reveal whether the pact moves beyond traditional patterns of cooperation and succeeds in deepening relations despite the partners' differing priorities across individual policy areas.

Its success in practice will depend not only on EU priorities, but also on the extent to which South Partner Countries share these priorities or develop their own, lead implementation, and mobilise the required capacities. Realising this in practice will also require sustained investment in national and regional capacities, including professional training systems, institutional learning, and implementation capabilities.

5 A window of opportunities for skills partnerships

In line with the previous point, demographic projections indicate that SPCs face a critical window between 2025 and 2035 in which favourable age structures and a large working-age population create an opportunity to strengthen education systems and human capital. Strategic investments in skills formation during this period – including structured skills mobility partnerships with the EU – could boost productivity and competitiveness throughout the region, while generating benefits for SPCs through remittances, knowledge transfers, and talent circulation. Well-designed mobility frameworks are most likely to deliver positive outcomes where they are paired with domestic education and employment reforms supporting welfare gains and include safeguards against skills depletion in key sectors. At the same time, their effectiveness will depend on the extent to which expectations and incentives are aligned between countries of origin and destination. Differences in migration aspirations, particularly regarding the duration and conditions of stay, may influence participation and outcomes in such schemes. As a result, skills partnerships are likely to become an increasingly salient issue for migration policymakers across the Mediterranean in 2026 and beyond, helping to rebalance migration narratives beyond securitisation and toward shared development objectives. However, their implementation will require careful calibration to ensure that they remain attractive, equitable and responsive to labour market needs on both sides. These initiatives are increasingly embedded within a broader dual approach combining the reduction of irregular migration with the expansion of legal pathways, including talent attraction and labour mobility schemes.

6 Growing relevance of route-based approaches

Recent developments across the Mediterranean underline the extent to which migration dynamics are increasingly shaped by complex, multi-country routes linking origin, transit and destination contexts. Rather than consisting of linear movements, these so-called "routes" function as interconnected trajectories that adapt rapidly to changes in enforcement, political conditions, and opportunity structures, with the EU's neighbouring regions increasingly acting as hubs within broader, cross-regional mobility systems.

Developments along the Central Mediterranean illustrate this trend: Libya remains the main departure point for crossings to Europe, while shifts in routes – including increased movements toward Greece – point to ongoing diversification despite declining overall arrivals. At the same time, some emerging corridors suggest how migration routes may combine regular entry channels, informal transit facilitation and, in some cases, smuggling networks across multiple regions.

In this context, 2026 is likely to see growing emphasis on trajectory-based (whole-of-route) cooperation frameworks, combining border management, anti-smuggling efforts, return cooperation, protection measures and legal pathways along the full trajectory of movement. However, the effectiveness of such approaches will depend on the ability of states to address governance gaps, align political priorities, balance enforcement with protection and ensure that protection safeguards remain integral rather than residual, along the full trajectory of movement.

7 The modernisation of migration governance

The rapid advancement of artificial intelligence and digital technologies is increasingly shaping migration governance across the Mediterranean region. Emerging tools, including predictive analytics, biometric systems, digital identity, and AI-assisted risk assessment solutions as well as digital solutions that facilitate legal mobility such as skills matching platforms and credential recognition, are expected to play a growing role in border and migration governance.

While these technologies offer the potential to enhance efficiency, situational awareness, and evidence-based policymaking, their adoption also raises important challenges. Unequal access to technological capabilities, infrastructure, and data systems may widen existing capacity and resource gaps between countries in the region, potentially affecting the balance of responsibilities and the effectiveness of cooperation frameworks. At the same time, the growing reliance on digital tools introduces considerations related to data protection, interoperability, transparency, and accountability.

In this context, strengthening digital capacities and ensuring more equitable access to technological solutions will become an increasingly important dimension of regional cooperation. This includes not only technical investments, but also the development of common standards, governance frameworks, and safeguards to ensure that digitalisation supports both effective migration management and the protection of fundamental rights.

Introduction

Introduction

This publication provides a regional perspective to ICMPD's Migration Outlook 2026, delving into key current and emerging migration trends in the Mediterranean region, with a focus on countries of North Africa and the Middle East. Whilst it does not have the ambition to foretell the future or cover all relevant trends, the Mediterranean Migration Outlook aims to highlight significant scenarios to consider in 2026 based on the analysis of recent data and policy developments.

Migration in the Euro-Mediterranean is shaped by enduring structural asymmetries and interdependencies. Geographically, the Mediterranean functions as both a bridge and a buffer between Europe and its conflict-affected neighbourhood, making migration a central component of EU foreign and security policy. Countries of North Africa and the Middle East play a key role in regional protection systems, hosting significant numbers of refugees and migrants particularly from Syria, Sudan, Palestine, and the Sahel. Economic and demographic dynamics further reinforce interconnectedness: countries on the south shores of the Mediterranean are characterised by large youth cohorts with rising educational attainment but limited job opportunities – particularly among women – while EU Member States face ageing populations and labour shortages across several sectors. In this context, migration has become an arena where humanitarian, economic, and geopolitical interests intersect, influencing cooperation agendas across the region.

These dynamics unfold against broader structural pressures, including the persistence of conflict-induced displacement from Sudan and the Sahel, the transition and difficult recovery and reconstruction path in Syria, and ongoing shifts in Europe's approach to external migration governance. At the same time, reductions in humanitarian funding have strained assistance systems across host countries in North Africa and the Middle East, adding pressure to already overstretched protection environments. They also encounter a more fragmented and volatile international environment, in which geopolitical alignments, security calculations, and diplomatic red lines are becoming less stable. As a result, migration governance is likely to be shaped not only by long-term structural drivers, but also by faster shifts in regional and global dynamics that can quickly alter cooperation incentives, mobility patterns, and conflict. Taken together, these factors suggest that 2026 may prove pivotal in determining whether current trends will steer the region toward more predictable and cooperative mobility frameworks or, conversely, whether protracted instability will deepen humanitarian needs and drive more complex patterns of irregular movement.

Focus regions

Focus regions

Gaza

On 8 October 2025, the conflict in Gaza entered a new phase following the implementation of a ceasefire between Israel and Hamas, constituting the initial stage of the US-proposed plan to end hostilities. Under the agreement, Hamas committed to releasing the remaining hostages from its 7 October 2023 attack, while the Israel Defence Forces (IDF) initiated a partial redeployment from Gaza. The framework also envisaged an expansion of humanitarian assistance into the territory. The ceasefire remains fragile and has been periodically disrupted by localised violence. Since its initiation, approximately 400 Palestinian fatalities have been reported, contributing to a cumulative death toll reported to exceed 70,000 people.

Humanitarian conditions, while marginally improved during the ceasefire, continue to be catastrophic, with widespread infrastructure damage, mass displacement, and systemic failure to reconstruct or maintain essential services. Aid delivery has increased by 67% at border crossing points; however, operational access constraints continue to significantly impede the distribution and effectiveness of humanitarian assistance.

2026 will test whether the ceasefire can support lasting diplomacy. A potential peace process remains uncertain, as it lacks a detailed timeline and binding commitments from both Israel and Hamas. Various proposals reportedly include an international stabilisation force; however, its mandate, funding, and rules of engagement remain unclear at the time of writing. This uncertainty contributes to donor reluctance to invest in the rebuilding of Gaza's infrastructure.

As a result, civilians affected by the war are unlikely to see only limited relief from their humanitarian plight in 2026. In the first year of the war alone, Gaza's GDP contracted by 83%, effectively wiping out 22 years of development. Restrictions on the entry of goods, limited access to inputs and technology, and repeated military operations dismantled productive capacity and left the territory almost entirely dependent on external assistance. Nearly 200,000 residential buildings and 81% of all structures had been damaged as of October 2025. Despite discussions during the ceasefire negotiations about relocating roughly 2 million people have been displaced, predominantly within Gaza. Only around 5% of those displaced have reached neighbouring countries, with Egypt emerging as the main regional destination, hosting approximately 100,000 displaced individuals, many in urgent need of medical care.

Lebanon

The election of a new President and the appointment of a Prime Minister, in early 2025, ended a prolonged political vacuum and has generated cautious optimism for Lebanon's governance and reform. The new leadership offers potential for renewed cooperation with international partners and implementation of structural changes to revive the economy and address long-standing crises. While the economic indicators showed tentative improvement in 2025 - including easing of the inflation rate to 12.2% (the lowest reading since February 2020) and an estimated 4.7% growth of the gross domestic product, the outlook remains highly contingent on sustained political stability, reform implementation and the wider security environment.

Since early 2026, however, reporting cited in this draft indicates a marked deterioration in the security situation. The ceasefire with Israel appears to have further eroded, with sustained airstrikes, limited ground incursions, and repeated evacuation orders reported across southern Lebanon, the Bekaa Valley, and the southern suburbs of Beirut. The escalation has triggered a large-scale displacement crisis, with shelter capacity under severe strain. These developments are placing acute pressure on Lebanon's already fragile systems. Public infrastructure and services, including health, shelter, and education, are under increasing stress, while economic activity is being further disrupted by insecurity, supply chain interruptions, and declining confidence.

Meanwhile – similarly to the Lebanese population - migrants and refugees in Lebanon continue facing a dire situation caused by the prolonged financial and political crisis, highly strained public services and negative migration narratives. Around 20% of Syrian refugee families live in informal settlements and collective shelters. Reports mention that these families regularly facing discrimination and bureaucratic barriers. 437,586 Syrians have returned to Syria from or via Lebanon since 8 December 2024, driven by a combination of deteriorating conditions in Lebanon and evolving dynamics in Syria, although the sustainability of these returns remains uncertain. These movements form part of a wider regional trend following recent developments in Syria: since December 2024, more than one million Syrian refugees have returned from neighbouring countries, while an estimated 1.86 million internally displaced persons have returned to their areas of origin within Syria.

Taken together, these dynamics suggest that the trajectory of Lebanon's migration situation in 2026 will depend on the interaction between renewed insecurity and the country's already limited absorption capacity. While earlier improvements in governance and economic indicators pointed to a potential stabilisation pathway, the current escalation risks compounding existing vulnerabilities, deepening humanitarian needs, and constraining reform efforts. More broadly, as in Syria and Gaza, meaningful recovery, and only then reconstruction, will require large-scale foreign investment, which is unlikely to materialise without credible guarantees that renewed hostilities will not again destroy infrastructure and other assets. In this context, cooperation initiatives are likely to be most effective when balancing immediate humanitarian response with longer-term support to institutional resilience, service delivery, and governance, rather than focusing narrowly on short-term migration management objectives.

North African countries

In recent years, North African countries have transitioned from being primarily countries of origin and transit for cross-border migration flows to becoming increasingly important destinations for international workers, refugees, and undocumented migrants. The expansion of migrant populations within their territories, coupled with persistent economic pressures and increasing scepticism towards migration among segments of the population, prompted governments to adopt more policies aimed at limiting irregular arrivals originating from sub-Saharan Africa. Available data and assessments indicate that 2025 continued to exhibit a highly dynamic migration picture, characterised by significant new arrivals, shifting routes – often in response to migration policy interventions – and an increasing number of migrants remaining in limbo, without a realistic prospect of either settling in their current host country or moving onward to another destination.

Once again, conflict acted as a key driver of inflow of arrivals in North Africa. In Egypt, United Nations High Commissioner for Refugees (UNHCR) registered approximately 150,000 new Sudanese refugees and asylum seekers during the first half of 2025, bringing the total number of registered individuals fleeing Sudan to nearly 1.5 million since the onset of the crisis. In Libya, the International Organization for Migration (IOM) reported a 19% increase in the migrant population in 2025, with around 867,000 foreign nationals present in the country – primarily originating from Sudan, Niger, Egypt, and Chad. The number of refugees and asylum seekers within this population also grew by 10% last year, exceeding 100,000 individuals.

Meanwhile, reports suggest that Libyan authorities intensified return operations and law enforcement actions targeting undocumented migrants throughout 2025. Returns also rose significantly in Tunisia, where Assisted Voluntary Return and Reintegration programmes supported the return of more than 8,853 migrants in 2025, surpassing totals recorded in previous years. Enhanced enforcement in both Libya and Tunisia may also have contributed to the redirection and diversification of migratory pathways, with a growing share of irregular departures now originating from Algeria and Morocco.

The shared priority of curbing irregular migration also prompted states on both sides of the Mediterranean to engage in discussions regarding more intensive forms of cooperation over the past year. However, not all new cooperation in the Mediterranean is geared toward controlling irregular migration. Based on shifting demographics and economic interests on both sides, existing and emerging partnerships increasingly incorporate elements of labour migration, human capital development, and education. One concrete example of such an initiative is the Vocational College model, which promotes skilled labour migration between Egypt and Germany by enabling young graduates of technical and vocational education programmes in Egypt to acquire skills and certifications that meet both domestic and international labour market requirements.

2026 will likely see the continuation of several trends that have characterised migration dynamics and policy responses in the region since years. First, the role of North African states will continue to shift from being primarily transit countries to becoming both destination and transit countries for mixed migration flows. Second, conflict-induced migration from conflict regions in Sudan, the Sahel, and other parts of sub-Saharan Africa can be expected to increase further. Third, North African countries, in closer cooperation with the EU, will likely continue to focus on control measures, return and readmission policies. From a migration-dynamics perspective, the countries north and south of the Mediterranean increasingly form a region of shared challenges and – as the growing cooperation in the area of Talent Partnerships shows – shared opportunities. In 2026 and beyond, both sides will face the challenge of jointly and more effectively addressing the root causes of displacement and irregular migration movements from Sudan, the Sahel, and other parts of sub-Saharan Africa. Only if this succeeds will structural and sustainable change in migration dynamics become a realistic option.

Sudan and the Sahel

Sudan and the Sahel remain the epicentres of severe humanitarian crises which are shaping migration movements across the Mediterranean region. Sudan continues to face a highly volatile migration situation driven by ongoing conflict, further compounded by climate-induced challenges and limited access to basic services, resulting in the world's largest internal displacement crisis. By January 2026, more than 11.7 million people had been displaced in Sudan – approximately 7 million within Sudan and over 4.4 million across borders into Chad, South Sudan, Egypt, Ethiopia, Libya, and the Central African Republic. As of December 2025, however, also 3.5 million returns to Sudan have been reported. While the majority of returns were recorded within Sudan, the Displacement Tracking Matrix (DTM) reported 585,176 return movements from neighbouring countries by the end of 2025. Most of formerly displaced households have returned to their areas of origin. Notably, approximately 90% of returnees cited improved security at their place of origin or intended destination as the primary driver of return. Despite this positive trend in return movements, overall return levels remain constrained by persistent insecurity and adverse socio-economic conditions.

Since the conflict erupted in April 2023, 24.6 million people have been pushed into acute food insecurity, amid the collapse of healthcare services and recurring disease outbreaks. IOM now identifies Sudan as the world's largest internal displacement crisis, with numbers continuing to rise as hostilities persist.

The Central African region has seen a 48% increase in forced displacement since 2020 with a notable rise in the number of IDPs and refugees. The Lake Chad Basin and the Central Sahel are major areas of conflicts, contributing to the displacement of populations. Chad hosts nearly half of the region's refugee population with a significant number of refugees from Sudan and the Central African Republic (CAR). The interaction of continuing militant activity, weakened militias, and declining state capacity and legitimacy increases the risk of further political destabilisation and displacement. Particularly in Mali, conflict and insecurity deepened in 2025 as armed groups and military operations spread violence across northern and central regions, driving significant internal and cross-border displacement. By June 2025, the country recorded over 400,000 IDPs, while by August 2025 some 335,430 Malians had sought refuge in neighbouring countries – primarily Mauritania, Niger and Côte d'Ivoire – and, to a lesser extent, in the EU via the Atlantic and Western Mediterranean routes. Similar dynamics can be observed in Niger and Burkina Faso where armed attacks and inter-communal violence resulted in the displacement of approximately 460,000 and 2 million people respectively. The escalation of violence, combined with town blockades and limited humanitarian access, compounded an already fragile humanitarian context shaped by extreme weather events, climate-induced food insecurity, and deepening displacement, heightening needs for protection and assistance. Across the Sahel, transnational kinship networks, seasonal labour mobility, and trade routes have long shaped movement patterns. The region functions as both a point of origin and transit, with significant flows towards North Africa and Europe. Historically, northbound migration has been driven by economic opportunities, particularly in Libya and Algeria, where Sahelian migrants have been employed in sectors such as construction, agriculture, and domestic work. In recent years, migration dynamics have shifted considerably due to a combination of insecurity, economic pressures, environmental stressors, and external interventions. Coups in Burkina Faso, Mali, and Niger have heightened international concern and contributed to changes in national migration governance. At the same time, reduced engagement in multilateral cooperation, alongside rising violent extremism and transnational crime, has led to tighter border controls and increased restrictions on movement across the region.

In 2026, the situation in Sudan and the Sahel is expected to remain unstable. In Mali, the imposition of economic and transport blockades around major cities by jihadist insurgents points to a further erosion of state authority and a heightened risk of territorial expansion by armed groups. A peace agreement in Sudan also appears unlikely in the near term, as rival factions continue to consolidate territorial gains rather than engage in meaningful negotiations, suggesting that displacement will remain protracted and may continue to rise.

Against this backdrop, migratory pressure on North African countries is likely to remain or even increase, prompting governments to further reinforce policies aimed at limiting irregular movements and expanding return and readmission efforts. While limited pockets of stability may emerge in parts of Sudan and enable actual returns from host countries, the severe humanitarian situation inside Sudan is unlikely to provide a sustainable basis for return and reintegration of the majority of the millions of displaced Sudanese hosted in the wider region. This situation also entails the risk of secondary displacement and the potential for secondary movements across the Mediterranean. Cooperation efforts in 2026 are likely to continue prioritising containment and deterrence of irregular migration, yet such measures alone may not be sufficient to reduce migratory pressures in the region without emphasising parallel efforts to address the underlying drivers of displacement in the Sahel and Sudan.

Syria

Last year, Syria experienced the most significant shift in migration dynamics since the start of the conflict driven by the collapse of the Assad regime in late 2024 and a changed security landscape that encouraged many Syrians to consider returning home. According to the UNHCR, more than one million refugees returned to Syria from neighbouring countries since December 2024, primarily from Türkiye, Lebanon and Jordan. In addition, as of 18 September 2025, an estimated 1,855,698 internally displaced persons (IDPs) had also returned to their places of origin within Syria. These movements – occurring amid fragile conditions and with varying levels of humanitarian support – reflected returnees' voluntary decisions driven by changing circumstances in Syria and a desire to reunite with family and rebuild lives after more than a decade of conflict. The changed situation in Syria was also reflected in a significant decline in irregular arrivals and asylum applications in the EU.

Despite this sizeable return trend, conditions inside Syria have remained highly fragile, with returnees facing widespread destruction of housing, damaged infrastructure, limited access to basic services and employment, and ongoing insecurity in some regions. For example, in July 2025, heavy fighting broke out in Sweida between Druze militias and Bedouin tribal fighters, drawing in Transitional Government forces between 14 and 16 July and causing large numbers of fatalities, displacement and serious human rights concerns. In contrast with the general trend, displacement from certain regions within Syria continued last year, with around 112,000 individuals (mostly from Tartous, Lattakia, Homs, and Hama in Syria) crossing into Lebanon since early December 2024. At the same time, limited progress in recovery and reconstruction continues to constrain the feasibility of durable return and reintegration across much of the country.

All these factors underline the ongoing security risks and fragile stability in formerly war-torn regions of Syria, as the country navigates its post-conflict transformation. Accordingly, developments in 2026 are uncertain. A successful political transition capable of bringing prolonged security and stability within Syria may further reduce refugee numbers and enable additional returns, even though their full potential is unlikely to be realised next year considering the country's dire economic and humanitarian conditions. Conversely, a deterioration of the political situation and renewed outbreak of violence could at any time reverse the progress of the past year and trigger renewed large-scale displacement and migration.

Migration
trends in the region

Migration trends in the region

Irregular migration

In 2025, over 154,400 migrants reached Europe across the Mediterranean (western, central and eastern) and the Atlantic Ocean irregularly, travelling primarily from Libya to Italy – through the Central Mediterranean Route – and from Türkiye to Greece – through the Eastern Mediterranean Route. As Figure 1 below shows, this constitutes roughly a 23% decrease from the irregular entries registered in 2024, indicating a continuation – although in a more moderate manner – of the downward trend which started last year and counteracted the significant growth of irregular arrivals in the EU registered after the easing of the COVID-19 restrictions. Such reduction of irregular migration flows is mainly driven by a sharp fall of detected crossings within the Western Routes – particularly among migrants reaching the Canary Islands via the Atlantic Ocean whose numbers shrank by 66% last year (from 41,756 in 2024 to 14,107 in 2025) – and in the Eastern Mediterranean Route – which registered a nearly 30% drop in the number of irregular crossings (from 69,436 in 2024 to 51,399 in 2025). Whilst remaining substantially stable from 2024, the Central Mediterranean Route once again emerged as the busiest migration route in the Mediterranean region with over 66,328 detected entries. Other important developments within the main routes include: the 400% rise in the number of migrants reaching Greece from the coast of Libya to the islet of Gavdos and the south shores of Crete, reaching a total of 19,948 arrivals in 2025; and the Western Mediterranean Route overtaking the Atlantic Route to become the primary entry point in Spain for the first time since 2020, with 19,403 arrivals.

With a slight decrease relative to the total number of irregular crossings in the previous year, an estimate of 2,169 people died or were reported missing while attempting to reach Europe within the Mediterranean region in 2025. Over half of the total number of deaths occurred in the Central Mediterranean Route.

Consistently with previous records, around 68% of all registered irregular maritime migrants were men, 10% were women, and 22% were children.

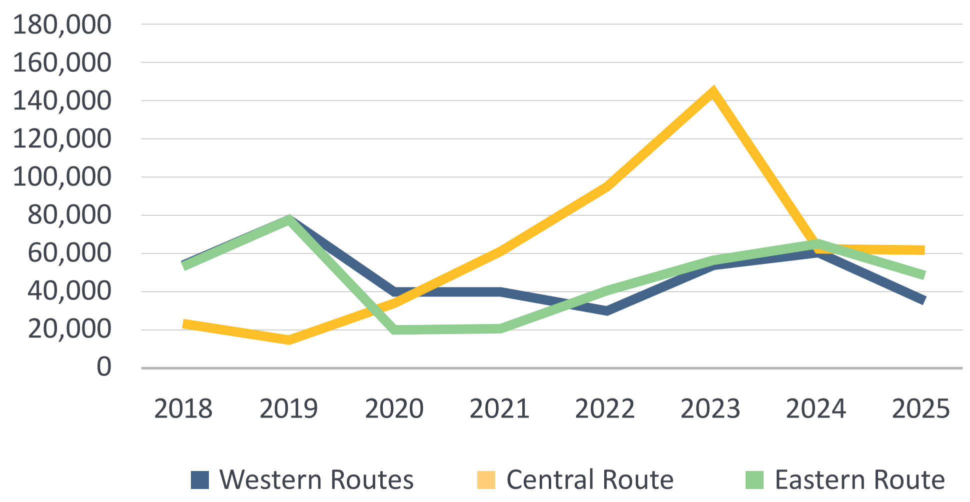
The four most represented countries of origin of irregular migrants detected in the Mediterranean region were: Bangladesh (22,145), Egypt (16,613), Afghanistan (13,394) and Sudan (12,642). A notable shift from the trend observed in previous years concerns the number of Syrians, which plummeted from over 43,600 and 41,900, in 2024 and 2023 respectively, to less than 5,300 in 2025. Conversely, the number of Sudanese nationals who have reached the EU via the Mediterranean – albeit still limited in absolute terms – has seen a more than threefold increase since 2024. Other nationalities experienced more moderate shifts in the number of irregular arrivals: Bangladeshi and Egyptians rose by over 40% in 2025, whereas Afghans fell by about 26% compared to 2024.

The reasons for which fewer people reached the EU through the Mediterranean last year are likely multifaceted. On the one hand, the changed security conditions in Syria following the fall of the Bashar al-Assad regime in December 2024, combined with subsequent decisions by major EU host countries to suspend the processing of international protection claims submitted by Syrians, may have disincentivised Syrian refugees and asylum seekers in the region from considering onward movement to the EU and increased their hope of returning home safely in the short to medium term.

On the other hand, declines among most of the main regional migration routes may be the fruit of intense EU-funded cooperation efforts in North Africa (Libya, Tunisia, Morocco, and Egypt) and West Africa (Senegal and Mauritania), that have focused primarily on introducing strict border governance policies in response to the previous years' heightened migratory pressure. For example, interception and anti-smuggling operations conducted by Mauritanian and Senegalese authorities appear to have shifted departure patterns further south along the Atlantic coast, away from the Mediterranean, and may have prompted many migrants to seek opportunities elsewhere within Africa.

In this regard, it should be noted that south-south migration is prevalent throughout the region, with the largest movements taking place within Africa and the Middle East. Finally, the moderate increase in the Central Mediterranean Route appears to be driven by a combination of displacement pressures and evolving political dynamics in the region, including increased departures from eastern Libya.

Figure 1: Irregular Arrivals in the EU - Mediterranean and Atlantic Routes (2018–2025)



Source: FRONTEX.

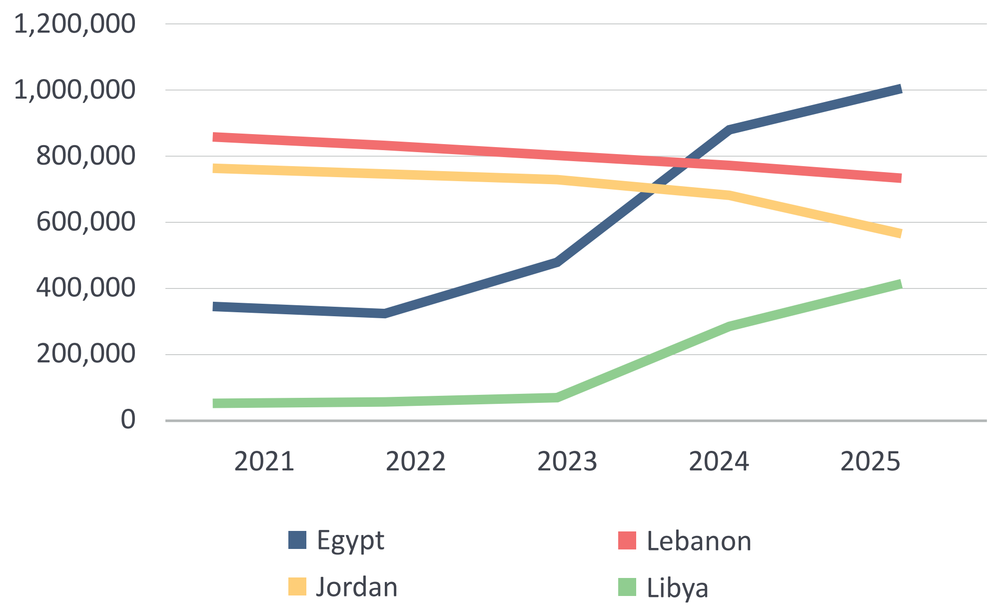
Refugees and asylum seekers' influx

The Mediterranean region continues to host one of the largest concentrations of refugee populations in the world. The large influx of refugees and asylum seekers to Egypt persisted in 2025, with numbers increasing from roughly 876,900, in 2024, to over one million at the end of 2025 (see Figure 2 below). In addition, refugees and asylum seekers in Libya almost doubled in number last year, going from 277,000, in 2024, to over 406,800 at the end of 2025. This significant growth can mainly be attributed to the protracted armed conflict in neighbouring Sudan, which has resulted in the displacement of over 3.4 million people, including an estimate of 822,000 and 86,850 Sudanese nationals who were registered as refugees in Egypt and Libya respectively at the end of 2025.

Whilst high in absolute numbers, the size of the refugee population in the Middle East, conversely, continued to decrease last year, with UNHCR estimating refugees/asylum seekers in Jordan and Lebanon to be just over 560,430 and 726,910 respectively. This solidifies a downward trend in the region, particularly noticeable in Lebanon, where the number of refugees has experienced an almost 30% contraction since 2017. The decrease is largely linked to the changed security conditions in Syria which, since December 2024, have driven the return to Syria of 615,586 Syrian refugees from or via Lebanon and Jordan.

Despite the global surge of projected resettlement needs, the most recent available stats show that the number of resettlement departures from the Middle East and North Africa have fallen from 27,012, in 2023, to 19,869 in 2024. The reduction reflects limited funding and difficulties in conducting resettlement operations – for e.g. in Libya and Syria – due to lack of access by resettlement states and the inability to conduct full remote processing.

Figure 2: Refugees and Asylum Seekers (2021–2025)



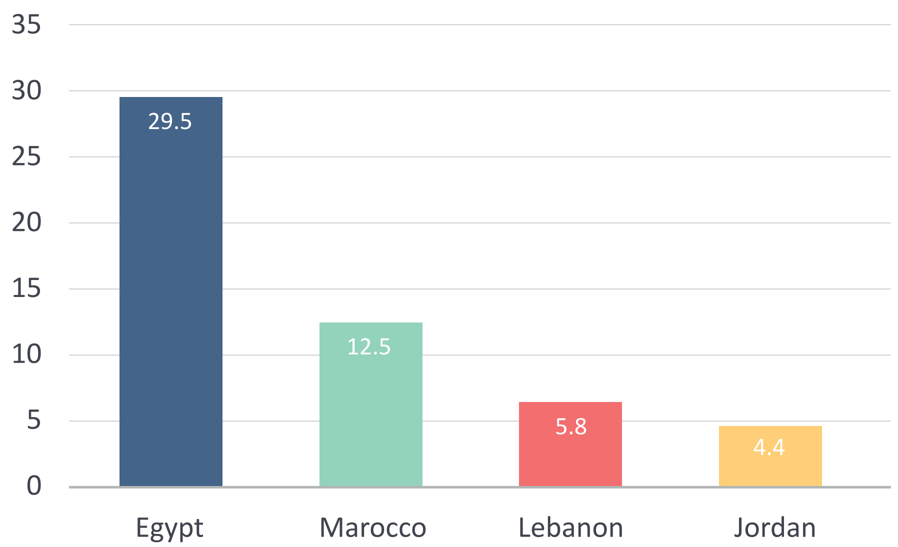
Source: UNHCR.

Remittances

The latest available data on remittances to Middle East and North African countries evidence an estimated growth of 5.4% in 2024, reversing the negative trend of recent years. The overall increase was mainly driven by inflows to Egypt – which climbed by around 50% in 2024 to $29.5 billion – and likely correlated to the Central Bank of Egypt's exchange-rate liberalisation which stabilised the Egyptian pound and reduced parallel markets, thereby fostering confidence among Egyptian expatriates to send remittances through official channels. Egypt remained by far the top recipient in the region (see Figure 3 below) – reflecting strong remittance ties with Egyptians living and working in countries of the Gulf Cooperation Council (GCC).

Consistent with the country's upward trajectory of the past years, Morocco has experienced a moderate growth in remittances which rose by almost 6% to $12.5 billion in 2024. The pace of remittances to Morocco has been particularly strong after the earthquake in September 2023 and helped alleviate some of the reconstruction costs and supported the country's external financial stability. Money inflows to Lebanon and Jordan – reaching 5.8 and 4.4 billion respectively – remained substantially stable since 2023.

Figure 3: 2024 top remittance recipients ($ billion)



Source: World Bank.

In 2024, remittances continued to account for a substantial share of the GDP of countries in the region, particularly in Lebanon (33.3%) and Jordan (8.3%). Notably, transfers to Palestine from abroad decreased by 23.3% in 2024, accounting for only 5.4% of Palestine's GDP, and reflecting diminished family support and international aid amidst the deepening crisis in Gaza. Lebanon and Palestine's economies remained vulnerable to heightened pressure on currencies and foreign currency reserves particularly after the regional escalation of the conflict in Gaza.

Finally, the cost of remittances in the region increased from an average of 5.8% (in the fourth quarter of 2023) to 6.4% (in the third quarter of 2024), likely due to the low internet and transaction account penetration affecting various corridors destined for the Middle East and North Africa.

Expected migration trends for 2026

Current dynamics suggest that migration patterns in the Mediterranean region will continue to be shaped by a combination of persistent conflict, uneven recovery processes, and evolving policy responses, with a potential additional influence from inflationary and broader economic pressures linked to the evolving situation in the region. While current developments have not yet resulted in significant new arrivals to the EU, their potential impact on future migration dynamics remains uncertain and will depend on how regional displacement evolves.

As the armed conflict in Sudan shows no sign of subsiding with rival factions consolidating territorial control and pursuing military gains, regional displacement from Sudan is expected to continue through 2026, although it is uncertain how it will develop. On the one hand, the emergence of isolated pockets of safety in certain areas of Sudan, coupled with the organised return measures adopted by many North African countries, may lead to heightened levels of internal displacement in, and return movements to, Sudan. On the other hand, it is possible that the influx of Sudanese asylum seekers in neighbouring countries will exacerbate economic hardship in host countries and drive a larger number of people, particularly Sudanese and Egyptians, to seek better opportunities elsewhere. This, combined with the enduring political instability and deterioration of living conditions in the Central Sahel, may reinvigorate irregular movements to the EU particularly through the Central and Western Mediterranean routes.

In the Middle East, large scale returns of Syrian refugees and asylum seekers from neighbouring countries will likely persist or grow. Despite the widespread housing and infrastructure damage left by the armed conflict, returning home may be a more promising prospect for displaced Syrians than staying in host countries in the face of increasingly precarious security and socio-economic conditions – particularly in Lebanon. This prediction is supported by UNHCR's latest return intention survey (conducted in July 2025) which indicates that the majority of Syrians wish to return one day (80%) while identifying safety and security concerns in Syria as major obstacles to their return.

Whilst EU Member States are expected to expand existing return programmes to Syria over the next years, the country's fragile stability will likely limit returns from the EU in 2026. The lesser prominence of Syrian refugees in the region may reasonably continue to bring down the number of irregular arrivals to the EU via the Eastern Mediterranean Route. Although, when considering Syria's volatile security landscape, an outbreak of armed violence cannot be ruled out: such scenario could trigger renewed large-scale displacement and migration including secondary movements of Syrians to Europe.

Across the Mediterranean, irregular migration trends will likely continue to reflect a combination of enforcement measures, shifting routes, and underlying drivers such as conflict, economic hardship, and limited legal migration pathways. Furthermore, although the full implications of recent developments - including escalation of conflict involving Iran – for displacement and migration pressures remain uncertain, their potential impact on broader migration dynamics, including secondary movements, will need to be closely monitored as the situation evolves. While strengthened border governance and cooperation with partner countries have contributed to recent declines in arrivals, these effects may remain uneven and subject to adaptation by migrants and smuggling networks. In this context, changes in routes – rather than sustained reductions in overall mobility – may continue to characterise migration dynamics.

Finally, the pace of remittances to the Middle East and North Africa is expected to moderately grow in the upcoming period, although, this trend may be influenced by uncertain developments across the region. Egypt's monetary easing and structural economic reforms may continue triggering

increased levels of remittances, while the likely uptake of the reconstruction and stabilisation processes in Gaza and Syria may attract large money transfers into Palestine and Syria respectively. Nonetheless, a potential expansion of the conflict in the Middle East and diminished growth prospects in GCC countries, linked to the weak global demand for oil, may weaken remittance flows particularly to oil-importer states such as Morocco and Tunisia.

Migration policy developments

Migration policy developments

EU cooperation in the region

Building on agreements concluded with SPCs in previous years, in January 2025, the EU and Jordan signed a Strategic and Comprehensive Partnership focussed on a wide range of policy areas, including political relations and regional cooperation, security and defence, economic resilience, trade and investment, education and skills, and migration and refugee support. As part of the deal the EU announced a financial package of €3 billion including a mix of loans and grants. Targeted areas in the migration domain included complementary pathways for protection, voluntary returns, border management, and counter-smuggling and trafficking in human beings.

In October 2025, negotiations between the EU and Morocco progressed toward a comprehensive partnership agreement aimed at strengthening migration management and border control, accompanied by financial and technical assistance measures. In the same month, the EU solidified its 2024 partnership with Egypt by confirming its commitment to disburse significant EU funding (€200 million as part of a €4 billion package) for migration management projects between 2024-2027, including through the implementation of the recently established EU-Egypt Talent Partnership. On the same occasion, Egypt announced its association to Horizon Europe, enabling Egyptian researchers and organisations to participate in all parts of the programme including mobility mechanisms.

Importantly, last year the European Commission launched a New Pact for the Mediterranean on the occasion of the 30th anniversary of the Barcelona Process, on 20 November 2025. The Pact, which followed the establishment of the Directorate-General and a commissioner portfolio exclusively focused on the Mediterranean in 2024, is a strategic framework to deepen cooperation with SPCs across security, economic development, and people-to-people ties, including migration and mobility. It aims to create a Common Mediterranean Space that addresses shared challenges and opportunities through co-developed, joint initiatives under three pillars: (i) people, (ii) sustainable economies, and (iii) security and migration management.

Whilst the first two pillars include concrete initiatives in the fields of education (e.g. the development of a Mediterranean University and the expansion of the Erasmus+ Programme) and economic investments, migration is included in the third pillar together with peace and security, disaster preparedness and law enforcement initiatives. The Pact proposes a whole-of-route approach to migration across the Mediterranean, emphasising coordinated action along origin, transit and destination pathways. This includes cooperation on integrated border management, countering migrant smuggling and trafficking networks, and strengthening frameworks for return and readmission. References are also made to enhancing the mobility of students, skills partnerships and supporting countries' voluntary efforts on resettlement and humanitarian admissions.

The operationalisation of the Pact is expected to shape EU cooperation efforts in the region in 2026. While migration will likely continue to be framed primarily through a stability and security lens, the Pact's emphasis on joint action and shared responsibility could gradually support more balanced mobility policies, that better reflect SPCs' development needs and address the structural drivers of international migration.

Irregular migration and asylum

In 2025, several EU Member States and SPC governments introduced new policy measures and undertook significant cooperation initiatives to better calibrate their responses to ongoing migration governance challenges linked with irregular migration flows.

After suspending the processing of Syrian claims for international protection due to the sudden fall of the Bashar al-Assad regime in 2024, the governments of some host countries of Syrian refugees in the EU, including Greece and Cyprus, have begun reassessing asylum applications of Syrian nationals based on the changed circumstances in Syria. Reportedly, a larger number of

rejections were issued, reflecting a broader recalibration of asylum policy in response to evolving conditions in Syria. Such policy shift was also formalised at the EU level with the publishing of the updated EUAA Country Guidance for Syria. The document, among other changes, reassessed several risk profiles following the fall of the Assad regime and concluded that the level of indiscriminate violence was no longer high in most of Syria's governorates. Such measures may facilitate more restrictive asylum decisions and could, over time, support a broader policy shift toward the return of some Syrian nationals, although practical, legal, and protection constraints remain significant.

In parallel, the Council and European Parliament approved an EU 'safe country of origin' list that includes all North African SPCs except Algeria and Libya. The list, which will enter into force in June 2026 as part of the EU Migration and Asylum Pact, will mandate the use of accelerated asylum procedures for applicants from designated safe countries, namely applicants from countries with an EU-wide protection recognition rate of 20% or lower. This is likely to expand the use of accelerated processing and may lead to more negative decisions and subsequent return orders for nationals of SPCs.

Furthermore, last year, Italy proceeded with the implementation of its Mattei Plan for Africa designed to boost economic growth in African countries, and to curb irregular immigration to Europe. Specifically, in July 2025, Italy and Algeria agreed to deepen cooperation on the fight against terrorism and irregular migration, while facilitating the conclusion of important deals in the energy and telecommunications sector between Algerian and Italian companies.

On the other shore of the Mediterranean, cooperation efforts in the field of return migration have intensified among SPCs. Last year, Egypt and Libya coordinated with Sudan programmes to facilitate the voluntary returns of Sudanese asylum seekers who fled to Libya and Egypt following the outbreak of Sudan's civil war in 2023. Libya concluded an agreement with Sudan for the return of roughly 450,000 Sudanese with IOM being envisaged to play a leading role in its implementation. In Egypt, the Ministry of Transport and the Egyptian National Railways in coordination with Sudanese authorities has established special transportation services from Cairo to Aswan, near the Sudanese border, with the aim to facilitate the return of Sudanese citizens.

In light of the above, policy initiatives in 2026 are expected to continue – within the framework of the Migration and Asylum Pact – tightening rules with the aim of preventing abuse of asylum procedures, deterring movements across the Mediterranean, and increasing returns. At the same time, strict irregular migration policies, if not carefully calibrated, risk heightening migratory pressure on SPCs and also reducing the protection space for a broader range of vulnerable people. Accordingly, policymakers will need to strike a difficult balance between national interests and the respect for individual human rights and refugee law, ensuring that enforcement objectives do not undermine humanitarian obligations, regional stability, or the credibility of asylum systems.

Labour mobility

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

In January 2025, Spain approved the GECCO Order, which expands labour and circular migration channels by facilitating multi-year seasonal work permits, simplifying recruitment procedures, and enabling training and reintegration support for participating migrant workers.

Moreover, in February 2025, Egypt, the EU, Germany and Italy launched the second phase of the Towards a Holistic Approach to Labour Migration Governance and Labour Mobility in North Africa (THAMM) Plus regional labour mobility programme under the EU-Egypt Talent Partnership. The programme seeks to strengthen labour migration governance, align skills with European labour market needs, and expand regular mobility pathways for Egyptian workers. THAMM Plus also supports reforms to improve training systems, recognition of qualifications, and recruitment standards, paving the way for structured and mutually beneficial labour mobility schemes between Egypt and Europe.

Finally, the mentioned New Pact for the Mediterranean contains several elements that could incentivise labour mobility and skills partnerships throughout the region. Under its first pillar, the Pact promotes technical and vocational education and training (TVET) aligned with labour market needs, expanding mobility in education and training (including student exchange), and enhancing employability for youth and women, thereby laying the groundwork for future labour mobility initiatives. In addition, the Pact envisages tools such as a MED Skill Tracker to document skills and facilitate recognition and transferability, which can smooth legal mobility and circular migration pathways by linking skills to opportunities within the region.

The gradual expansion of structured mobility initiatives – such as the Talent Partnerships – is likely to continue in 2026. The Southern Mediterranean's growing working-age population presents potential to alleviate EU labour shortages, while cooperation on skills development and labour mobility could support sustainable growth and job creation in SPCs. Expanding labour migration pathways may offer mutual benefits such as increased remittances, knowledge transfer, and reduced labour market pressure in both regions.

Another cross-cutting development likely to shape migration governance across the Mediterranean is digital transformation. Across the region, there is growing interest in digital and data-driven tools to support case management, border procedures, mobility schemes, returns, skills matching, and coordination across institutions. If designed and governed responsibly, such tools can improve efficiency, transparency, and evidence-based policymaking; if not, they may deepen unequal capacities and raise concerns related to data protection, exclusion, and oversight.

Conclusions

Conclusions

Looking ahead, migration dynamics in the Mediterranean in 2026 are likely to remain shaped by the interaction of persistent conflict, uneven recovery processes, and evolving policy responses across an increasingly interconnected region. While recent developments have contributed to a temporary reduction in irregular arrivals to the EU, underlying drivers of displacement and mobility – particularly in Sudan, the Sahel, and parts of the Middle East – remain largely unchanged. As a result, migration pressures are expected to persist, albeit in shifting and less predictable forms.

A key feature of the current landscape is the growing complexity and fluidity of migration patterns. Movements across the region continue to be predominantly south–south, with most displaced populations remaining within neighbouring countries. At the same time, limited protection space, economic constraints, and restricted mobility options in key host countries may contribute to secondary movements, including toward Europe. In this context, changes in routes – rather than sustained reductions in overall mobility – are likely to remain a defining characteristic of migration dynamics.

Policy responses over the past year have demonstrated that strengthened border governance and external cooperation can produce short-term reductions in irregular arrivals. However, these measures have also coincided with increasing pressure on host countries in North Africa and the Middle East, where growing migrant and refugee populations face constrained access to services, protection, and long-term solutions. This has contributed to more protracted displacement situations and, in some cases, heightened incentives for onward movement.

More broadly, the current combination of conflict, increasing numbers of irregular arrivals, externalisation, return pressures, and shrinking protection space affects not only migrants and refugees directly, but also the ability of states and institutions to uphold due process, non-discrimination, and protection obligations. At the same time, the policy landscape is evolving.

Alongside continued emphasis on containment and return, there is a gradual expansion of initiatives related to labour mobility, skills partnerships, and broader economic cooperation frameworks. These developments point to a potential rebalancing of migration governance approaches, although their scale and impact will depend on effective implementation and alignment between European and partner country priorities.

Against this backdrop, migration routes are increasingly functioning as interconnected systems linking origin, transit and destination contexts. This reinforces the importance of approaches that address migration dynamics along the full trajectory of movement, combining border management, protection, and legal pathways. The effectiveness of such approaches will depend on the ability of stakeholders to address governance gaps, strengthen cooperation, and respond flexibly to rapidly evolving conditions.

That said, ultimately, the evolving reconfiguration of the international order may continue to shape migration governance in the Euro-Mediterranean region in ways that remain difficult to anticipate. Without presuming the direction or pace of these changes, it is worth considering how a more fluid and contested global landscape may affect migration governance in the Euro-Mediterranean. To what extent might emerging alignments reshape cooperation frameworks, funding priorities, or diplomatic engagement in the region? And how might this evolving context influence migration policies and governance? Exploring these questions may help to better situate regional migration dynamics within wider transformations that could redefine both constraints and opportunities for cooperation in the period ahead.

Overall, 2026 is likely to represent a period of adjustment rather than resolution. The extent to which current policy developments can contribute to more predictable and cooperative migration governance will depend on their capacity to address both immediate pressures and underlying structural drivers. Without such alignment, migration dynamics are likely to remain characterised by volatility, route diversification, and continued humanitarian challenges across the region.

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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.

The boundaries and names shown and the designations used on the maps do not imply official endorsement or acceptance by ICMPD.

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