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AlphaGeo
BUILDING A RESILIENT FUTURE

Special Report
July 2026

Modeling MENA Migration:

Flows, Drivers and Policy Implications (2021–2026)

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Abstract

Between 2021 and 2025, over 28 million cumulative migration movements were recorded across the Middle East and North Africa (MENA) region spanning nearly thirty countries. This report maps those flows using bilateral origin-destination modeling, projects 2026 annual flows based on averaged baseline data and geopolitical drivers, and identifies the structural forces – such as conflict, climate, and labour demand – that will define MENA migration through 2030. The principal findings are:

(1) conflict-driven displacement from Syria, Afghanistan, Sudan, and Palestine dominates the largest corridors;

(2) Gulf-bound labour migration from Egypt, Pakistan, Yemen, and Jordan constitutes the second dominant structural pattern;

(3) Iran's 2026 war has introduced the largest new displacement dynamic in the dataset, with 300,000+ projected annual arrivals to Turkey alone;

(4) climate hazards in Afghanistan, Iraq, Yemen and Sudan are already generating outflows and will intensify as groundwater declines, temperatures breach physiological limits, and agricultural systems fail; and

(5) policy responses are failing and efforts to contain migration are not a durable solution. Policy recommendations are organized by destination country ranked by migrant stock, with actionable reform proposals on legal status, labour market integration, digital identity, and housing.

Introduction

The MENA region is experiencing a migration crisis of structural magnitude. Between 2021 and 2025, over 28 million cumulative migration movements were recorded across a network of 29 countries spanning conflict zones, Gulf labour markets, North African transit corridors, and European destination hubs. These flows are not episodic or random, they are the product of identifiable structural forces: protracted armed conflict in Syria, Afghanistan, Sudan, and Palestine; a Gulf-bound labour demand system embedded in the kafala sponsorship architecture; a European containment strategy that outsources migration governance to underfunded neighboring states; and an emerging climate displacement dynamic that existing international protection frameworks are entirely unprepared to address.

The outbreak of the Iran-Israel-United States conflict in early 2026 has introduced the most significant new displacement variable in the regional dataset since the Syrian civil war. With over 300,000 Iranians projected to arrive in Turkey annually in 2026 alone, a corridor that was negligible in the 2021–2025 baseline, the region is entering a new phase of displacement that compounds existing pressures without a commensurate evolution in policy response. Simultaneously, climate-driven agricultural collapse in provinces such as Helmand (Afghanistan), Basra (Iraq), Hadramawt (Yemen), and Sistan-Baluchestan (Iran) is generating outflows that are already visible in the baseline data and will intensify as groundwater tables collapse, temperatures breach physiological limits, and agro-climatic zones shift southward.

Against this backdrop, the dominant policy response, both within the MENA region and in Europe, is failing. Islamic solidarity, long assumed to provide a cultural and religious basis for Muslim-majority states absorbing Muslim refugees, has collapsed under economic and political pressure: Pakistan deported 1.7 million Afghan Muslims between 2023 and 2025; Iran expelled 750,000 more. The European Union's containment strategy, which committed over €906 million to North African migration management between 2021 and 2024, has created what this paper terms a **managed dependency,** a system in which recipient states are incentivized to restrict integration rather than enable it, sustaining migrant populations in legal limbo rather than producing durable solutions. The June 2025 abolition of the kafala system in Saudi Arabia, while the most significant structural reform in Gulf migration governance in a generation, has been implemented selectively and without the enforcement mechanisms necessary to alter the lived reality of millions of low-wage migrant workers.

Purpose. This paper makes three contributions. **First,** it provides the first bilateral origin-destination (O-D) migration matrix for the MENA region covering the full 2021–2025 period, mapping cumulative migration stock across 29 countries and over 500 potential corridors, of which 67 exceed the 10,000-movement significance threshold. **Second,** it projects 2026 annual migration flows using an averaged baseline methodology supplemented by geopolitically-informed corridor-level overrides, producing the first quantitative forward estimate of MENA migration in the context of the Iran war. **Third,** it identifies the climate migration provinces, those sub-national units already generating climate-displaced outflows that will intensify over the 2026–2030 horizon, and provides a province-level risk overlay drawing on IPCC AR6, ND-GAIN, World Bank CCDR, and OCHA subnational data.

Structure of the Paper. The paper proceeds as follows. Section II reviews the existing literature on MENA migration, identifies key methodological and empirical gaps, and situates this paper's contribution within that literature. Section III presents the contemporary O-D baseline matrix, covering cumulative bilateral flows for 2021–2025 with a full summary of findings. Section IV provides the qualitative expert research synthesis. Section V develops the migration driver strength assessment framework (H/M/L ratings) and the 2026 annual projection, presented as a Sankey flow visualization and geographic absorption map. Section VI presents the climate specific overlay, mapping the highest-risk origin provinces by hazard type, current population, and migration driver. Section VII synthesizes findings on the role of religion and Islamic solidarity in shaping host country reception postures. Section VIII provides policy recommendations organized by destination country ranked by cumulative migrant stock, with actionable proposals on legal reform, labour market integration, digital identity, and housing. The paper concludes with strategic findings on the three structural failures that define MENA migration governance in 2026.

Data sources: UNHCR Refugee Data Finder | UNRWA | GASTAT | IOM DTM 2025–2026 | World Bank CCDR | OECD International Migration Outlook 2025 | UNESCO Iraq Water Task Force January 2026 | IEA National Climate Resilience Assessments | ACAPS Drought Reports 2024 | IPCC AR6 Cross-Chapter Paper 4 (Mediterranean) | ND-GAIN Country Index 2022

Literature Review

The academic literature on MENA migration has developed along three principal axes: conflict-driven displacement, labour migration governance, and, more recently, climate-induced mobility. This section reviews the major contributions within each axis, identifies empirical and methodological gaps that persist in the existing literature, and situates the present paper's contribution within that landscape.

Conflict-Driven Displacement and the Refugee Protection Regime

The Syrian refugee crisis of 2011–2016 generated an unprecedented volume of academic and policy literature on forced displacement in the MENA region. Castles (2003) and Zetter (2007) established the foundational theoretical distinction between forced and voluntary migration, a distinction that MENA displacement scholars have consistently found inadequate for capturing the mixed-motive flows characteristic of the region, where conflict, economic collapse, and climate stress often operate simultaneously. Crisp (2017) and Betts and Collier (2017) advanced the debate on refugee burden-sharing and the political economy of hosting, identifying the structural incentives that lead neighboring states to adopt containment rather than integration policies, a dynamic this paper documents empirically across Jordan, Lebanon, Egypt, and Morocco in the 2021–2025 period.

On the Syrian case specifically, Chatty (2017) and Janmyr (2016) documented Lebanon and Jordan's extra-legal approach to refugee hosting, operating large displaced populations outside of any formal legal framework, a pattern this paper finds has not only persisted but intensified following the post-Assad transition of December 2024. Fargues and Fandrich (2012), writing in the aftermath of the Arab Spring, anticipated the regional displacement dynamics that would materialize over the following decade, noting the absence of regional asylum frameworks and the over-reliance on UNHCR as both protection and status determination body, a reliance that Egypt's Asylum Law No. 164/2024 has now disrupted without a credible replacement mechanism.

The Afghan displacement literature, the world's largest protracted refugee situation, has been dominated by studies of Pakistan and Iran as host states. Monsutti (2005) and Turton and Marsden (2002) documented the complex, multi-directional, and often circular nature of Afghan mobility, challenging the linear origin-to-destination model that underpins much displacement scholarship. This paper incorporates those dynamics through corridor-level override methodology, specifically discounting the Afghanistan-Pakistan and Afghanistan-Iran corridors in the 2026 projection to reflect documented mass deportation dynamics that reverse the assumed growth trajectory.

Gulf Labour Migration and the Kafala System

The political economy of Gulf labour migration has been extensively documented by Khalaf and Alkobaisi (1999), Kapiszewski (2001), and more recently by Vora (2013) and Mahdavi (2011), who examined the structural features of the kafala (employer sponsorship) system and its implications for migrant worker rights, social stratification, and permanent settlement exclusion. The Gulf Labour Markets and Migration (GLMM) programme at the European University Institute has produced the most systematic quantitative work on Gulf migration flows, and this paper draws on GLMM data as a primary source for the Gulf-bound labour corridors that constitute the single largest volume of movement in our O-D matrix (Saudi Arabia: 6,877,661 cumulative arrivals, 2021–2025).

Recent scholarship has examined the reform trajectory of kafala. Gardner (2010) and Longva (1997) documented the system's origins in colonial-era labour governance frameworks, while Dito (2015) and Fernandez (2014) analyzed the domestic political economy that makes Gulf states resistant to fundamental reform. The June 2025 kafala abolition in Saudi Arabia, the most significant reform event in this literature, has not yet been subject to systematic academic evaluation, and this paper provides the first policy analysis of its implementation gaps and selective application.

Climate Migration and Environmental Displacement

The literature on climate-induced migration in MENA has grown significantly following IPCC AR6 (2022), which identified the Mediterranean and MENA as among the world's most climate-vulnerable regions. Black et al. (2011) and Rigaud et al. (2018), in the landmark World Bank 'Groundswell' reports, provided the foundational quantitative frameworks for climate migration projection, estimating 216 million internal climate migrants globally by 2050 under moderate scenarios. Rigaud et al. specifically identified Sub-Saharan Africa, South Asia, and Latin America as the dominant climate migration source regions, a finding this paper complements by documenting the province-level climate displacement dynamics already active within the MENA region itself.

Kelley et al. (2015), in a widely cited **PNAS** study, documented the link between the 2006–2010 drought in Syria and the rural-to-urban displacement that contributed to the conditions preceding the 2011 conflict, establishing empirically the climate-conflict-migration nexus that this paper operationalizes at the provincial level across Yemen, Iraq, Sudan, Afghanistan, Egypt, and Iran. Werrell and Femia (2013) and Gleick (2014) further developed the climate-security-displacement linkage in the MENA context. However, the existing literature has focused primarily on internal displacement dynamics and macro-level projections, leaving a significant gap in province-level, cross-border climate migration analysis, the gap this paper's climate specific overlay is designed to fill.

Quantitative Migration Modeling and the O-D Matrix Approach

Quantitative bilateral migration flow modeling has advanced substantially over the past decade. Abel and Sander (2014) produced global bilateral migration flow estimates using a demographic accounting approach, establishing a methodological precedent for the bilateral matrix framework adopted in this paper. Abel (2018) extended this work to produce comparable five-year period flow estimates, and the Global Bilateral Migration Database maintained by the World Bank (Özden et al., 2011) provides the longest-running stock-based O-D dataset. However, these global frameworks are too coarse for the subnational conflict and climate dynamics that drive MENA migration, they aggregate country-level stocks rather than documenting corridor-level flows shaped by specific conflict events, policy changes, and climate shocks.

Within the MENA-specific literature, the IOM's Displacement Tracking Matrix (DTM) and UNHCR's Refugee Data Finder provide the most granular primary data, but neither produces bilateral O-D matrices at the regional level on a systematic basis. The GLMM programme has produced bilateral flow data for Gulf labour corridors specifically. This paper is the first, to the authors' knowledge, to integrate conflict displacement, labour migration, and climate displacement data into a single bilateral O-D matrix covering the full MENA region for the 2021–2025 period, and to project those flows forward on an annual basis using a corridor-level methodology.

Gaps in the Existing Literature

Three gaps in the existing literature motivate this paper's contribution. **First:** there is no systematic bilateral O-D migration matrix for the full MENA region covering the post-COVID, post-2023 conflict escalation period (2021–2025). Existing datasets either cover earlier periods, focus on single corridors or country pairs, or aggregate flows at a level of granularity that obscures the corridor-level dynamics most relevant for policy. **Second:** the existing migration projection literature has not incorporated the Iran war of 2026 as a displacement variable, despite its potential to generate the largest new displacement wave in the region since the Syrian crisis. **Third:** the climate migration literature has not produced province-level cross-border displacement analysis for MENA, it has identified countries and regions at risk, but not the specific subnational origin provinces already generating outflows, the hazard mechanisms driving departure, or the destination corridors absorbing the resulting movement. This paper addresses all three gaps.

Key references: Abel & Sander (2014) Science | Betts & Collier (2017) Refuge | Black et al. (2011) Nature Climate Change | Castles (2003) International Migration | Chatty (2017) Displacement and Dispossession | IPCC AR6 CCP4 Mediterranean (2022) | Kelley et al. (2015) PNAS | Rigaud et al. (2018) World Bank Groundswell | World Bank Global Bilateral Migration Database (Özden et al. 2011) | GLMM Programme EUI | IOM DTM 2025–2026 | UNHCR Refugee Data Finder

Contemporary O-D Baseline Matrix (2021–2025)

Overview

The following baseline table maps cumulative migration flows between key origin and destination countries across the MENA region and Europe for the period 2021–2025. Countries were selected based on UNHCR and IOM data identifying the highest volumes of outbound migration from the MENA region and the primary destinations receiving those flows.

Origin Countries Selected (Outbound / Source)

Syria, Afghanistan, Iraq, Yemen, Libya, Sudan, Palestine, Morocco, Algeria, Tunisia, Egypt, Iran, Pakistan, Turkey, Lebanon, Jordan.

Selection rationale: These countries consistently rank among the top producers of refugees and migrants in the MENA region according to UNHCR Refugee Data Finder (2021–2025).

Destination Countries Selected (Inbound / Receiving)

Turkey, Germany, France, Italy, Spain, Greece, United Kingdom, Netherlands, Belgium, Iran, Pakistan, Lebanon, Jordan, UAE, Saudi Arabia, Qatar, Egypt, Morocco, Canada, USA.

Selection rationale: These countries represent the primary documented destinations for MENA outbound migration flows based on UNHCR and IOM flow monitoring data. European countries are included given significant migration corridors from MENA to Europe, as well as recent re-migration and deportation flows from Europe back to MENA countries. Iran and Pakistan added based on UNHCR Global Trends 2023 data confirming their status as top-5 global refugee hosting countries (hosting primarily Afghan refugees).

Country Selection Summary

Country	Origin	Transit	Destination
Syria	Largest source of refugees globally, with 6.1M+ displaced due to ongoing civil conflict since 2011.		
Afghanistan	5.7M+ refugees driven out by Taliban governance, conflict, and economic collapse.	*Key transit route through Iran and Pakistan toward Europe and Gulf states.*	
Iraq	Protracted displacement since 2003 conflict; continued instability drives outflows.		
Yemen	Ongoing civil war and humanitarian crisis generating large-scale internal and external displacement.		
Libya	Internal conflict and state fragmentation produce significant domestic displacement.	*Primary North African transit corridor for sub-Saharan and MENA migrants heading to Europe.*	
Sudan	Rapid escalation of conflict post-2023 producing one of the fastest-growing displacement crises.		
Palestine	Large-scale forced displacement, dramatically accelerated post-October 2023 conflict in Gaza.		

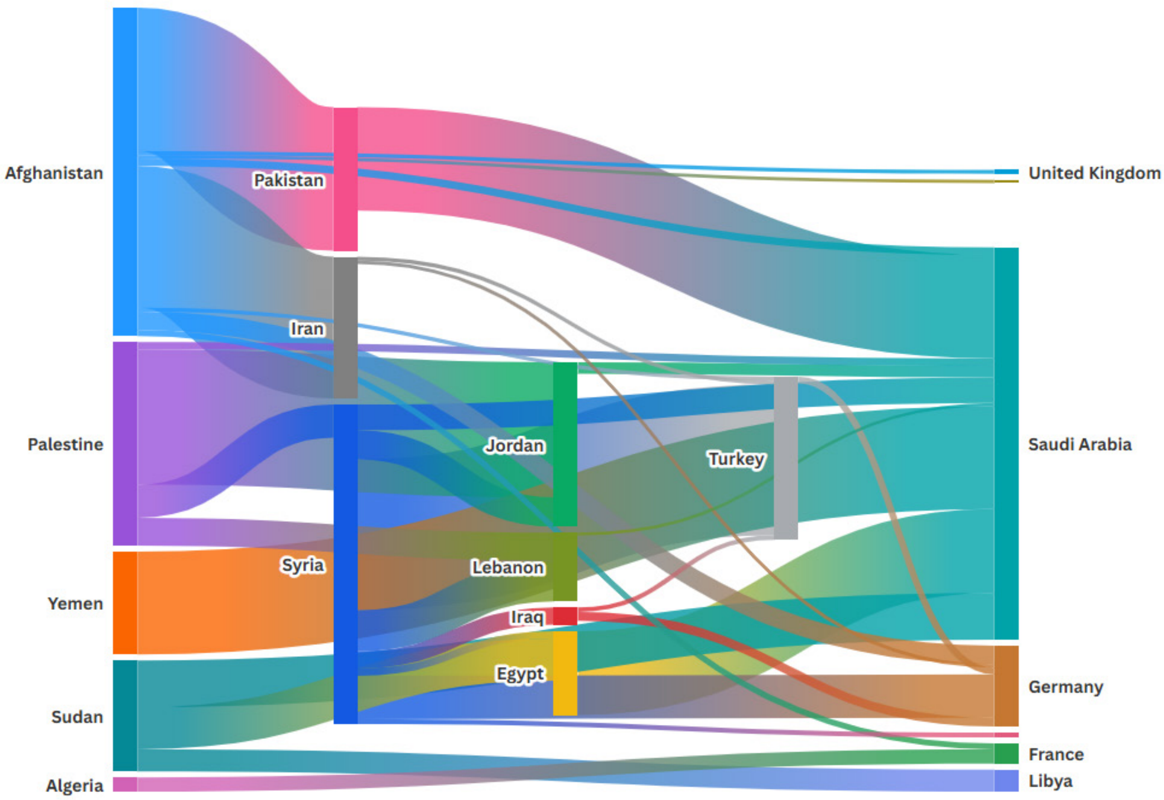
Morocco	Significant emigration to Europe, particularly Spain and France, driven by economic factors.	*Major transit country for sub-Saharan African migrants attempting to reach Europe.*	
Algeria	Substantial emigration to France driven by historical ties, economic migration, and youth unemployment.		
Tunisia	Growing emigration driven by economic stagnation and political instability post-2021.	*Key Mediterranean departure point for irregular migration to Italy.*	
Egypt	Significant emigration driven by economic pressures; hosts Sudanese and Libyan refugee populations.		Hosts major refugee populations from Sudan, Libya, and Syria.
Iran	Growing outflow of educated and middle-class Iranians driven by sanctions, economic hardship, and political repression.		Hosts 3M+ Afghan refugees, one of the largest refugee populations globally.
Pakistan			Hosts 2M+ Afghan refugees; primary destination for Afghan displacement alongside Iran.
Turkey	Significant Turkish emigration to Germany and Europe driven by historical labour migration and political factors.	*Critical transit country for migrants moving from MENA and Central Asia toward Europe.*	Hosts 3.3M+ Syrian refugees; largest single refugee-hosting country globally.
Lebanon	Major Lebanese emigration crisis driven by economic collapse and political instability post-2019.		Hosts Syrian refugees constituting approximately 20% of total population; among highest per-capita globally.
Jordan	Some emigration of Jordanian nationals, primarily to Gulf states for labour.		Hosts large Iraqi and Syrian refugee populations; a key frontline state for MENA displacement.
Germany			Largest European host of MENA and Afghan refugees; key destination for asylum seekers from Iran, Syria, Afghanistan.
France			Primary destination for North African diaspora, particularly Moroccan, Algerian, and Tunisian migrants.
Italy / Spain / Greece		*Mediterranean entry points receiving irregular migration flows from North Africa and the Middle East.*	Frontline EU states absorbing significant MENA and African asylum seeker arrivals.
United Kingdom			Historical MENA diaspora destination; post-Brexit asylum flows increasingly from Iran, Iraq, and Afghanistan.
Netherlands / Belgium			Significant MENA asylum seeker populations, particularly from Syria, Iraq, Iran, and Turkey.
UAE / Saudi Arabia / Qatar			Primary labour migration hubs for MENA workers; host millions of Egyptian, Jordanian, Lebanese, and Pakistani labourers.
USA / Canada			Secondary destination for MENA refugees and diaspora; significant Iranian, Iraqi, Syrian, and Lebanese communities.

Note on Data Methodology

All figures in the Excel O-D matrix represent cumulative migration stock for the 2021–2025 period rather than annual flows, in order to capture overall movement patterns suitable for Sankey flow visualization. Where exact 2021–2025 data was unavailable, the most recent available year was used with a notation in the corresponding cell.

Interactive Sankey Flow Visualization: MENA Migration Corridors (2021–2025)

The Sankey diagram below maps the major bilateral migration corridors identified in the O-D baseline matrix, filtered to flows of 50,000 or more cumulative migrants for the 2021–2025 period. Each flow band is scaled proportionally to the volume of movement: wider bands indicate larger population transfers. Origins are listed on the left and destinations on the right. Three structural patterns dominate the visualization: (1) conflict-driven displacement from Syria, Afghanistan, Palestine, and Sudan toward neighboring states and Europe; (2) labour migration from Egypt, Pakistan, Yemen, and Jordan toward Gulf states, particularly Saudi Arabia; and (3) intra-regional hosting, with Turkey, Jordan, Lebanon, Iran, and Pakistan absorbing the largest refugee populations in absolute terms, (4) North Africa→Europe labour and mixed migration, with Algeria emerging as a primary origin toward France

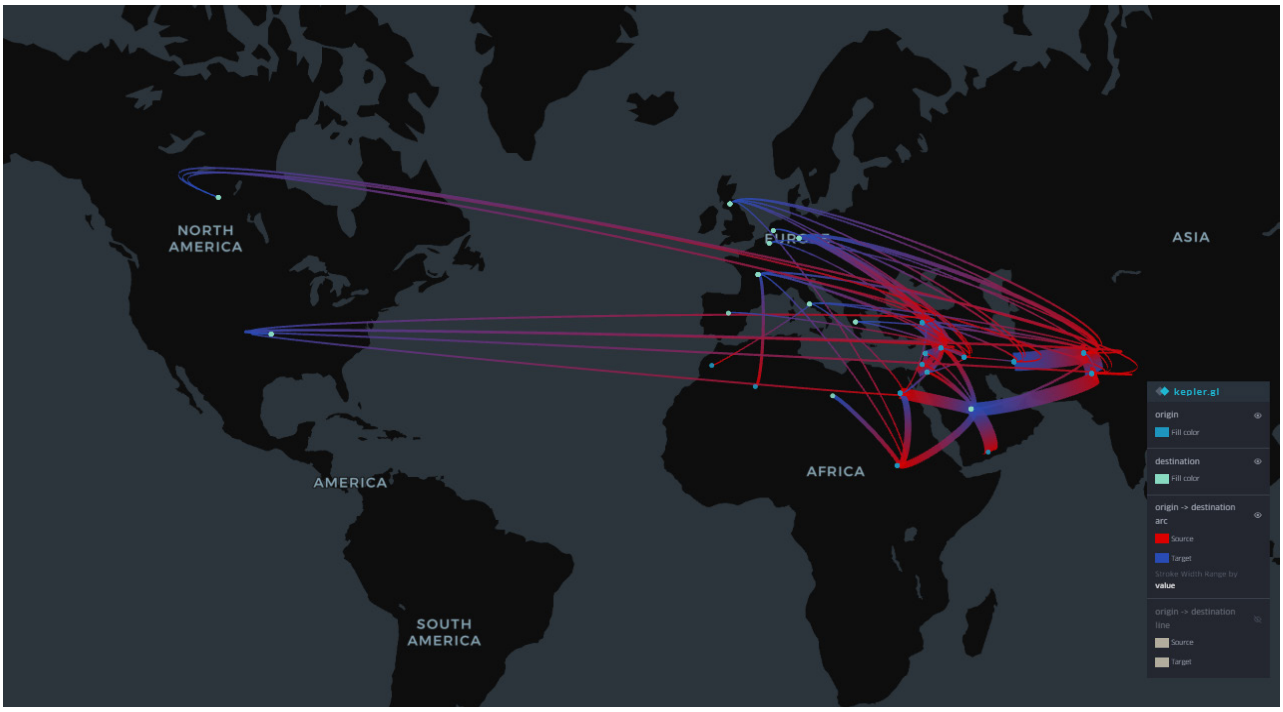


→ [Interactive visualization: MENA Migration Sankey Chart (Flourish)]

Note: Live interactive chart hosted on Flourish. Click the link above to view and interact with the visualization. Source data: UNHCR Refugee Data Finder, UNRWA, GASTAT, IOM DTM, OECD International Migration Outlook 2025 | Period: 2021–2025 | Threshold: flows ≥50,000 cumulative stock only.

Geographic Flow Map: MENA Migration Corridors (2021–2025)

The map below plots the major bilateral migration corridors from the O-D baseline matrix onto a geographic projection. Arc thickness is scaled to cumulative migration stock, thicker arcs represent higher-volume corridors. Arc color encodes directionality: red indicates the origin end of each corridor, transitioning to blue at the destination. All corridors shown reflect cumulative stock above 10,000 migrants for the 2021–2025 period, capturing a broader range of flows. Three spatial clusters are the dominant structural story: a dense web of conflict-driven flows converging on Turkey from Syria, Afghanistan, Iraq, and Iran; a set of Gulf-bound labour corridors from Egypt, Yemen, Pakistan, Sudan, and Jordan toward Saudi Arabia; and a series of long-distance arcs connecting the MENA region to Germany, France, the UK, the Netherlands, Italy, Spain, Greece, and Belgium via Turkey and the eastern Mediterranean.



Map produced using Kepler.gl (kepler.gl) on OpenStreetMap base layer. Arc thickness scaled to cumulative migration stock. Arc color transitions from red (origin) to blue (destination) to indicate flow directionality. Source data: UNHCR Refugee Data Finder, UNRWA, GASTAT, IOM DTM | Period: 2021–2025 | Threshold: flows ≥10,000 cumulative stock.

Summary of Findings of the Contemporary O-D Baseline Table

The O-D baseline table captures cumulative migration stock across 29 countries spanning the MENA region, Europe, and key receiving states for the 2021–2025 period. Taken together, the data reveals a total tracked migration stock of approximately 23.9 million people, with flows concentrated around a small number of high-volume corridors driven by three distinct forces: conflict-driven displacement, regional labour migration, and Palestinian structural displacement.

Conflict displacement dominates the largest bilateral flows. Syria's 2.6 million refugees in Turkey represent the single largest bilateral corridor in the dataset, reflecting the protracted nature of the Syrian crisis and Turkey's role as the world's largest refugee-hosting country. Afghanistan generates the highest total outflow of any origin country at approximately 5.9 million, split almost evenly between Iran (2.5 million) and Pakistan (2.5 million) which are two non-MENA neighbors that have absorbed the overwhelming majority of Afghan displacement for decades. Iraq's flows toward Turkey, Germany, and Jordan reflect ongoing instability, while Sudan's rapidly growing outflows, particularly toward Egypt (737,000) and Saudi Arabia (820,000), signal one of the fastest-escalating crises in the dataset post-2023.

Labour migration to Gulf states constitutes the second dominant pattern. Saudi Arabia emerges as the single largest destination country in the dataset with over 6.9 million total inflow, driven almost entirely by labour rather than forced displacement. Pakistan (1.8 million), Yemen (1.8 million), Egypt (1.5 million), and Jordan (204,000) all show Saudi Arabia as their primary or dominant destination, flows that are structurally distinct from refugee movements and were captured through GASTAT and IOM sources rather than UNHCR.

Palestinian displacement presents a unique structural pattern. Unlike other origin countries whose flows respond to recent conflict escalation, Palestinian migration stock reflects decades of accumulated displacement. Jordan alone hosts 2.4 million Palestinian refugees under UNRWA mandate, while Lebanon hosts 486,000 and Syria 583,000. The post-October 2023 Gaza conflict is expected to significantly alter these figures in subsequent data cycles.

Europe absorbs significant but secondary flows. Germany stands as the primary European destination with 1.5 million total inflow, drawing heavily from Syria (760,000), Afghanistan (325,000), Iran (60,000), and Iraq (156,000). The United Kingdom, France, and the Netherlands follow at smaller volumes, reflecting historical diaspora ties and asylum policy differences. Notably, Turkey also appears as a significant origin country for European migration, with 118,000 Turkish nationals recorded in Germany, a flow rooted in decades of labour migration rather than displacement.

Re-migration and reverse flows remain limited in the dataset. European countries show minimal outbound flows toward MENA in the UNHCR data, consistent with the finding that deportation and re-migration flows are not systematically captured by refugee-tracking sources. This represents a data gap that may warrant supplementary sources in subsequent research phases.

Qualitative Summary: Expert Research and Regional Context

According to the UNHCR Global Trends 2024 report (published June 2025), there were 123.2 million forcibly displaced people worldwide at the end of 2024, a record high, representing 1 in every 67 people on Earth. Sudan has emerged as the world's largest displacement crisis, with 14.3 million displaced nearly one in three of the national population. Syria remains the largest source of refugees globally with 6.1 million, hosted primarily by Türkiye (2.9 million), Germany (725,000), Lebanon (755,000), and Jordan (611,500). Afghanistan generates the second largest refugee population at 5.8 million, concentrated in Iran (3.5 million) and Pakistan (1.6 million). Palestine saw catastrophic displacement following the October 2023 conflict, with 90% of Gaza's population uprooted by end-2024. The IOM World Migration Report 2024 adds broader context: approximately 281 million people live outside their country of birth globally (3.6% of the world population), and the Gulf states particularly Saudi Arabia and the UAE are among the most significant destination regions for migrant workers globally.

Migration in the MENA region is driven by three overlapping forces. First, conflict-driven forced displacement from Syria, Sudan, Yemen, Iraq, and Palestine, continues to push millions toward neighboring countries and Europe. Second, labour migration toward the Gulf states and Europe is driven by unemployment, economic inequality, and lack of opportunity, particularly from Egypt, Morocco, Algeria, Pakistan, and Lebanon. The World Bank's Migration and Development Brief 2024 highlights that remittances to MENA fell 15% to $55 billion in 2023, largely due to disruption in Egypt's official flows, confirming the scale of Gulf-bound labour migration from Egypt and the broader region. Third, climate change is an accelerating compounding driver, the Mixed Migration Centre's research identifies water scarcity, extreme heat, and livelihood loss in southern Iraq, Yemen, and North Africa as increasingly pushing people out even in the absence of active conflict. MMC notes that climate mobility is typically a last resort, occurring only after multiple support systems have already collapsed.

Looking ahead, expert analysis points to three key trajectories. Syria's migration landscape is shifting significantly following the fall of the Assad government in December 2024. UNHCR estimates up to 1.5 million Syrians may return from abroad by end-2025, though conditions inside Syria remain fragile and re-displacement is a documented risk. Sudan's crisis is expected to intensify before it stabilizes, with flows toward Egypt, Libya, and Chad likely to continue growing. The Mixed Migration Centre's Q3 2025 North Africa update confirms a structural dynamic that experts emphasize will persist: enforcement-driven route displacement. Restrictive measures in Libya, Tunisia, and Mauritania are not reducing overall migration but are rerouting it, pushing flows through Algeria toward Spain and toward Greece via eastern Libya. EU-Morocco and EU-Jordan migration partnership negotiations underway in late 2025 are expected to intensify border controls further, likely generating new route shifts. The IOM notes that migration corridors are stable and predictable over time, driven by geography, economic networks, and diaspora ties, suggesting that existing MENA-to-Europe and MENA-to-Gulf corridors will remain dominant.

Several data limitations are worth flagging. UNHCR data captures forced displacement and refugee populations but does not track labour migration, which represents the dominant flow in Gulf-bound corridors from Egypt, Pakistan, and Jordan. The World Bank notes a significant gap between official and informal remittance reporting, particularly in Egypt where parallel exchange rates distorted official figures until 2024. Libya's migrant population is acknowledged by IOM, UNHCR, and NGOs as significantly underestimated, official figures of 867,055 may not reflect the true scale, with local estimates of Sudanese in Libya alone approaching 800,000. Additionally, the pace of change in key situations, particularly Syria's post-Assad return dynamics and Sudan's escalating crisis. means that some figures in this research, based on 2024–2025 data, may already be subject to revision.

2026 Outlook: Projected Migration Drivers by Origin Country

Origin Country	Key Drivers 2026-2030	Strength	Expected Destination(s)
Iran	Geopolitics/conflict; foreign policy; labour market. US-Israel Operation Epic Fury (Feb 2026) internally displaced 3.2M Iranians. Cross-border outflows currently limited (~1,300/day via Turkey) but if urban infrastructure collapses, a mass exodus on the scale of or exceeding Syria is projected. Iran's 90M population means even a 10% outflow rivals the largest refugee crises since WWII. Pre-war brain drain of educated middle class accelerating since 2022 sanctions. Gulf countries could be viewed as unsafe labour destinations, with Iranian missile strikes in these countries, disrupting Gulf-bound corridors.	H	Turkey (primary land route, visa-free); Germany (educated diaspora); Iraq; Armenia; Azerbaijan. Gulf states severely disrupted by active Iranian strikes on Gulf infrastructure.
Sudan	Geopolitics/conflict; climate; humanitarian funding collapse. World's largest displacement crisis: 11M+ internally displaced, 4.3M+ fled abroad. SAF recaptured Khartoum (March 2025) but fighting intensified in Kordofan in early 2026. Only 13% of 2026 humanitarian appeal funded. Egypt ramped up deportations (Dec 2025). Libya route to Europe growing, 313,000 Sudanese now estimated in Libya.	H	Egypt (35% of cross-border outflows); Chad; South Sudan; Libya (transit to Europe); Saudi Arabia (diaspora labour). Europe via Libya corridor growing.
Syria	Geopolitics/conflict; foreign policy; labour market. Assad fell December 2024; 2.6M+ refugees and IDPs have returned but conditions remain fragile, sectarian violence, collapsed infrastructure, no functional state. UNHCR estimates up to 1.5M may return from abroad by end-2025, but re-displacement risk is high. Israeli strikes on Syrian territory ongoing as part of Iran war. Remittance inflows declining as Gulf restrictions tighten.	M	Returnees to Syria from Turkey, Lebanon, Jordan. But re-displacement toward Turkey and Germany likely if transition fails or Israeli strikes intensify.

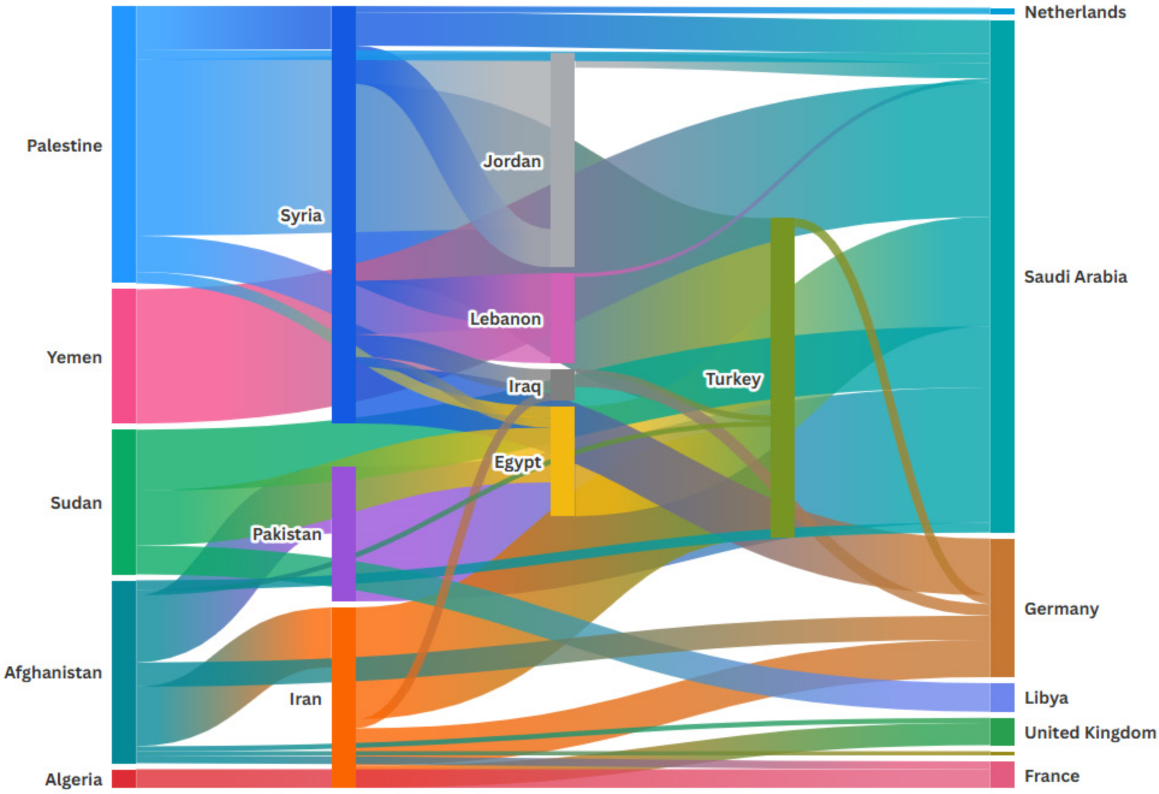
Afghanistan	Foreign policy; geopolitics/conflict; climate. Iran deported ~2M Afghans in 2025 alone; Pakistan expelled 1.3M+ since 2023. Returns are forced into Taliban-controlled territory with no economic infrastructure. Pakistan-Afghanistan border closed since Oct 2025. Afghan refugees still in Iran (~2.6M) now caught in active conflict zone. Taliban governance eliminates women from labour force. Climate stress (drought, water scarcity) accelerating in southern/eastern provinces.	**H**	Iran and Pakistan remain primary hosts but increasingly unwilling. Germany, UK, Netherlands for prior asylum claimants. Onward flows to Europe via Turkey growing as deportation pressure mounts.
Palestine	Geopolitics/conflict; foreign policy. 90% of Gaza population uprooted by end-2024. Rafah crossing reopened briefly early 2025 then closed again. Israel escalating West Bank annexation since Dec 2025. Iran war diverting global attention, potentially enabling accelerated annexation moves. 100,000+ Palestinians already in Egypt. UNRWA mandate under sustained political and funding pressure.	**H**	Egypt (100K+ already; likely to grow); Jordan (2.4M under UNRWA); Lebanon (486K). Europe as secondary destination growing. US/Canada pathways shrinking under Trump immigration restrictions.
Lebanon	**Geopolitics/conflict; foreign policy; labour market.** Israel-Hezbollah escalation (March 2026) displaced 300K+ Lebanese; shelters at capacity. Economic collapse since 2019 ongoing. Brain drain of educated youth accelerating. Gulf labour diaspora at risk as Iranian missile strikes on Gulf countries threaten remittance flows. France and Canada are historical diaspora anchors.	**H**	UAE (disrupted by Iran war); France; Canada; Cyprus; Gulf states. Internal displacement to northern Lebanon growing. Onward migration to Europe likely to accelerate if Hezbollah conflict continues.
Yemen	Geopolitics/conflict; climate; labour market. Houthis drawn further into Israel-Iran conflict, US operations against Houthis cost $1B in three weeks in 2025. Ongoing civil war and humanitarian crisis ongoing. Climate-driven water scarcity and extreme heat in southern Yemen a structural push factor. Large labour diaspora in Saudi Arabia (1.8M) at risk as Gulf security deteriorates under Iranian strikes.	**H**	Saudi Arabia (dominant labour corridor, now at risk); Oman; Jordan. If Gulf security collapses further, Europe as secondary. Internal displacement to Aden and northern regions ongoing.
Egypt	**Labour market; foreign policy; climate.** Youth unemployment remains structurally high despite pound stabilization post-2024. Gulf labour is the primary economic safety valve, at risk due to Iran war disrupting Gulf stability. Hosting 1.4M+ Sudanese straining Cairo and Alexandria urban services. Nile water stress and rising temperatures a medium-term driver. Egypt increasingly using deportation to manage refugee inflows.	**M**	UAE (primary, 1.47M labour migrants); Saudi Arabia; Italy (irregular sea route); Germany. Gulf labour corridors at significant risk if Iran-Gulf escalation continues.
Morocco / Algeria / Tunisia	**Labour market; foreign policy; climate.** EU-Morocco and EU-Jordan migration partnership negotiations ongoing (late 2025). Enforcement-driven route displacement, stricter Libyan and Tunisian controls rerouting flows through Algeria toward Spain and eastern Libya toward Greece. Youth unemployment structural across all three countries. Climate stress (drought, desertification) intensifying in interior regions. EU far-right political shift reducing asylum pathways but not overall flows.	**M**	Spain (Morocco); France (Algeria/ Morocco); Italy (Tunisia via Lampedusa). Route shifts toward Canary Islands and eastern Mediterranean as central Mediterranean enforcement tightens.

Pakistan	**Labour market; geopolitics/conflict; foreign policy.** Deporting 1.3M+ Afghans while facing its own economic pressures. Border with Afghanistan closed since Oct 2025. Large Gulf labour diaspora (Saudi Arabia 1.8M) remains primary economic outlet but Gulf instability growing. Educated middle class emigrating to UK and Canada (accelerating brain drain). Pakistan caught in regional instability, Afghan returns, Iran war fallout, India tensions.	**M**	Saudi Arabia (dominant); UAE (disrupted); UK; Canada. Onward flows of Afghan transit migrants via Pakistan to Europe likely to increase as Iran route becomes more dangerous.
Iraq	**Geopolitics/conflict; foreign policy; climate.** Iran-Israel war directly hitting Iraqi territory, Shia militias based in Iraq drawn into the conflict, US and Israeli strikes on militia positions reported. Iraq already hosts 280K+ refugees and 1.2M IDPs. Water scarcity in Tigris-Euphrates basin a structural climate driver. Protracted displacement from 2003-2023 period unresolved.	**M**	Turkey (transit and destination); Germany; Netherlands; UK. Jordan as regional stopover. If Iran war spills further into Iraq, internal displacement likely to spike sharply.

Driver strength: H = High (strong structural or acute driver, near-certain significant outflows) | M = Medium (moderate drivers, likely continued but not escalating flows) | L = Low (minor or declining drivers). Sources: UNHCR Global Trends 2024, IOM DTM 2025-2026, Mixed Migration Centre 2025, World Bank Migration Brief 2024, CFR Global Conflict Tracker, Newsweek/Al Jazeera/Fortune (March 2026 Iran war coverage).

Projected Sankey Flow Visualization: MENA Migration Corridors (2026 Annual Projection)

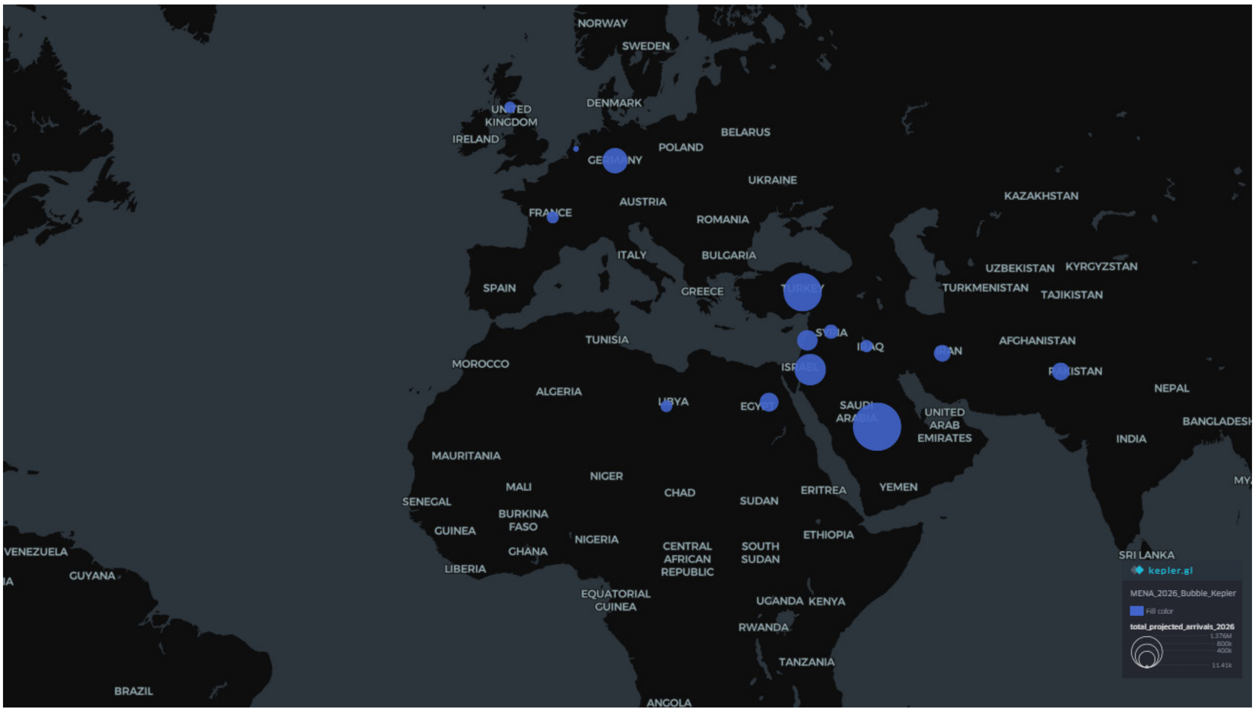
The Sankey diagram below presents projected bilateral migration corridors for 2026, derived from the 2021–2025 O-D baseline by calculating the average annual flow (baseline cumulative stock ÷ 5 years) for each corridor. This reflects projected annual arrivals rather than a multi-year cumulative stock, making it directly comparable to a single reference year. Three categories of corridor-specific override were applied where current evidence contradicts a simple baseline average. Downward adjustments were made for Afghanistan corridors toward Iran and Pakistan, reflecting mass deportation campaigns that are actively shrinking these flows. Flat holds were applied to all Gulf-bound labour corridors from Yemen, Pakistan, Egypt, Jordan, and Lebanon, reflecting regional instability from the Iran war and the March 2026 Iranian missile strike on Dubai's Jebel Ali port. Upward-revised estimates were applied to Iran as a major new origin country, with Turkey, Germany, and the UK as primary destinations, sourced from IOM and Mixed Migration Centre crisis monitoring data from March 2026. Two new corridors not present in the baseline are introduced: Iran to Iraq, reflecting cross-border displacement via the 1,600km shared border, and Palestine to Egypt, reflecting 100,000+ Palestinians already displaced into Egypt following the Rafah crossing closures. Algeria to France is introduced as a new corridor based on OECD International Migration Outlook 2025 data. All projected corridors shown exceed 10,000 projected annual arrivals.



→ [Interactive visualization: MENA Migration Projected Sankey Chart 2026 (Flourish)]

Note: Projected flows are illustrative extrapolations based on 2021–2025 baseline stock averaged to annual figures, with corridor-specific overrides applied where geopolitical evidence warrants departure from the baseline average. Afghanistan–Iran and Afghanistan–Pakistan corridors adjusted downward to reflect active deportation dynamics. Gulf-bound labour corridors held flat at baseline annual average due to Iran war regional instability. Iran origin corridors estimated from IOM/MMC March 2026 crisis monitoring data. Palestine–Egypt and Algeria–France corridors introduced as new routes based on UNHCR/MMC 2025 and OECD 2025 data respectively. All projections subject to revision as geopolitical conditions evolve. Source data: UNHCR Refugee Data Finder, UNRWA, GASTAT, IOM DTM, MMC, OECD International Migration Outlook 2025 | Baseline period: 2021–2025 | Projection year: 2026 | Threshold: flows ≥10,000 projected annual arrivals.

Geographic Absorption Map: Projected Migrant Destinations (2026)



The bubble map above visualizes projected annual migrant absorption by destination country for 2026, aggregated across all inbound corridors. Each circle is sized proportionally to total projected annual arrivals. Three nodes dominate the absorption landscape: **Saudi Arabia** (1.38M projected annual arrivals) remains the single largest destination, absorbing Gulf-bound labour from Pakistan, Yemen, Egypt, Sudan, Jordan, and Lebanon. **Turkey** (859K) is the second largest node, now significantly elevated by the Iran war surge, Iranian displacement alone accounts for 300,000 projected arrivals. Jordan (577K) ranks third, driven by Palestine and Syria. In Europe, **Germany** (372K) remains the primary long-distance destination, receiving flows from Syria, Afghanistan, Iran, Iraq, Turkey, and Algeria. The map complements the Sankey above by showing not where migrants come **from**, but where they are projected to **land** in 2026.

Map produced using Kepler.gl on OpenStreetMap base layer. Circle size scaled to total projected annual arrivals aggregated across all inbound corridors per destination. Source data: UNHCR Refugee Data Finder, UNRWA, GASTAT, IOM DTM, MMC, OECD International Migration Outlook 2025 | Projection year: 2026 | All corridors included (no threshold applied to destination totals).

Emerging Population Hubs: Key Migrant-Receiving Cities (2024–2026)

The table below identifies the top three to four migrant-receiving cities within each of the eight primary destination countries covered in this research. Cities are ranked by total migrant or refugee population size based on the most recent available data (2024–2026). Growth trend reflects whether the migrant population in each city is currently expanding, stable, or declining. Three distinct urban settlement patterns emerge across the dataset: conflict-driven urban absorption (Istanbul, Amman, Beirut, Cairo), Gulf labour migration hubs (Riyadh, Dubai, Abu Dhabi), and emerging mixed-settlement cities driven by enforcement-driven route displacement and return migration (Casablanca, Rabat, Tangier).

Country	City / Zone	Migrant Population (latest)	Migrant Type	Trend
Turkey	**Istanbul**	~470,000 reg. Syrians (2024); est. 500K+ total	Conflict-displaced (Syrian, Afghan, Iraqi)	**Declining** *Post-Assad voluntary Syrian returns reducing Istanbul population since Dec 2024; repatriation programmes active.*
Turkey	**Gaziantep**	~377,000 reg. Syrians; 14.74% of city population	Conflict-displaced (Syrian)	**Stable** *Government-designated interior zone; stable textile/trade economy; lower political pressure than Istanbul.*
Turkey	**Şanlıurfa**	~235,812 reg. Syrians; 9.55% of city population	Conflict-displaced (Syrian)	**Declining** *Post-Assad returns accelerating; Şanlıurfa Syrian population declining as IDPs depart or return home.*
Turkey	**Hatay**	~200,000+ Syrians; 10.80% of city population	Conflict-displaced (Syrian)	**Declining** *Border-adjacent; Syrian returns and reduced new inflows reversing demographic shift from peak conflict years.*
Jordan	**Amman**	244,265 registered refugees (Aug 2024)	Conflict-displaced (Syrian, Iraqi, Sudanese)	**Declining** *Slow Syrian returns post-Assad; funding gaps reducing UNHCR service capacity; some registered refugees departing.*
Jordan	**Mafraq / Za'atari**	161,942 reg. refugees + ~80,000 in Za'atari camp	Conflict-displaced (Syrian)	**Stable** *Za'atari population stabilized at ~78K; Jordan Compact SEZ sustaining livelihoods; managed outflow.*
Jordan	**Irbid**	122,967 registered refugees (Aug 2024)	Conflict-displaced (Syrian)	**Declining** *Syrian returns reducing registered population; UNHCR presence maintained but scaling back registration.*
Jordan	**Zarqa**	94,413 registered refugees (Aug 2024)	Conflict-displaced (Syrian, Iraqi)	**Declining** *Reduced new registrations; some voluntary returns; funding shortfalls impacting community services.*
Lebanon	**Bekaa Valley**	~550,000–600,000 Syrians (est.); 37% of Lebanon's Syrian pop.	Conflict-displaced (Syrian)	**Declining** *Mass Syrian return post-Assad Dec 2024; UNHCR estimates 250K+ returned in first 3 months of 2025.*
Lebanon	**Beirut & Mount Lebanon**	~400,000–500,000 Syrians + displaced Lebanese	Conflict-displaced (Syrian, Palestinian)	**Volatile** *Active conflict Mar 2026; population shifting unpredictably; simultaneous displacement and arrival events.*
Lebanon	**Tripoli (North)**	~200,000 Syrians (est.); schools as shelters Mar 2026	Conflict-displaced (Syrian)	**Growing** *War-displaced converging on Tripoli; schools repurposed as emergency shelters (UNHCR Mar 2026).*
Lebanon	**South Lebanon (Tyre)**	Mass evacuation; 667,000 newly displaced in one week	Conflict-displaced (Lebanese, Syrian)	**Highly volatile**
Germany	**Berlin**	993,295 total foreign pop. (Dec 2024); 24.9% of city	Mixed (Syrian, Afghan, Iraqi, Turkish)	**Growing** *Mar 2026: 667K newly displaced in one week; South Lebanon acute crisis zone, not stable settlement hub.*
Germany	**Frankfurt**	57.0% migration background (2023) — highest major city	Mixed; MENA & Turkish diaspora	**Stable** *Königstein Key maintains NRW quota at 21%; established MENA communities; labour market absorption stable.*

Germany	**Munich**	~49.5% migration background (2024)	Mixed (Syrian, Afghan, Turkish, Iraqi)	**Growing** *57% migration background (2023); Frankfurt financial sector draws skilled MENA and Iranian diaspora.*
Germany	**Hamburg / Cologne**	Key asylum reception cities; large MENA populations	Conflict-displaced (Syrian, Afghan, Iranian)	**Stable** *49.5% migration background (2024); Skilled Workers Immigration Act 2023 accelerating intake in shortage sectors.*
Egypt	**Greater Cairo**	~700,000–900,000 refugees; majority of Egypt's 877K	Conflict-displaced (Sudanese 69%, Syrian 17%)	**Rapidly growing** *War-driven Iranian diaspora surge 2026; Hamburg and Cologne key asylum reception cities for new arrivals.*
Egypt	**Alexandria**	Significant Sudanese & Syrian population; UNHCR present	Conflict-displaced (Sudanese, Syrian)	**Growing** *Sudanese conflict (Apr 2023) drove 1.5M+ into Egypt; UNHCR registrations more than doubled since Jan 2024.*
Egypt	**Aswan**	Key border arrival zone; Sudanese registration center	Conflict-displaced (Sudanese)	**Growing** *Secondary destination for Sudanese overflow; UNHCR field office present; more affordable than Cairo.*
Egypt	**Kalyoubia / Sharkia**	Emerging peri-urban Sudanese settlement zones	Conflict-displaced (Sudanese)	**Emerging** *Border arrival and primary Sudanese registration zone; inflows sustained as Sudan conflict intensifies.*
Saudi Arabia	**Riyadh**	~4.35M foreign workers (excl. domestic); 45% of national workforce	Labour migrants (Egyptian, Pakistani, Yemeni)	**Stable** *Vision 2030 sustaining foreign worker quotas; kafala system limits volatility; labour demand steady.*
Saudi Arabia	**Jeddah / Mecca**	~17% of Saudi workforce; major Egyptian & Pakistani hub	Labour migrants; pilgrimage overstayers	**Stable** *Religious tourism and oil economy stable; Jeddah-Mecca corridor labour demand consistent.*
Saudi Arabia	**Eastern Province**	~18% of Saudi workforce; oil industry migrant workers	Labour migrants (technical/ industrial)	**Stable** *Oil industry labour demand consistent; Eastern Province industrial workforce maintained at contracted levels.*
Saudi Arabia	**Medina region**	Significant migrant worker + pilgrimage overstayer pop.	Labour migrants + irregular (Hajj overstayers)	**Stable** *Medina development projects sustaining demand; Hajj economy stable despite Iran war regional tensions.*
UAE	**Dubai**	~3.83M residents (Dec 2024); ~88% expatriates; pop. tripled since 2000	Labour migrants (Egyptian, Pakistani, Lebanese)	**Rapidly growing** *Dubai population tripled since 2000; 2024 net migration among highest globally; financial hub expanding.*
UAE	**Abu Dhabi**	~4.14M residents (2024); 7.5% growth in 2024 alone	Labour migrants (Egyptian, Pakistani, Indian)	**Rapidly growing** *Abu Dhabi 7.5% population growth in 2024; ADNOC and sovereign wealth expansion driving labour demand.*
UAE	**Sharjah**	~1.8M residents; affordable alternative to Dubai	Labour migrants (South Asian, Egyptian)	**Growing** *Sharjah absorbing Dubai spillover due to lower costs; sustained in-migration from South Asia and MENA.*
UAE	**Ajman / Ras Al Khaimah**	~500,000–345,000; growing spillover from Dubai/Abu Dhabi	Labour migrants (lower-income)	**Growing** *RAK and Ajman growing as lowest-cost UAE alternatives; logistics and tourism sector expanding.*
Morocco	**Casablanca**	Largest share of 142,152 foreign residents (2024 census); sub-Saharan African dominant	Sub-Saharan African migrants + return migrants	**Growing** *Sub-Saharan African migration increasing; Casablanca labour market absorbing informal workers; SNIA active.*
Morocco	**Rabat / Temara**	2nd largest migrant hub; UNHCR & NGO presence	Sub-Saharan African, Syrian; return migrants	**Growing** *Rabat NGO presence attracting registered refugees; UNHCR HQ drawing protection-seekers.*
Morocco	**Tangier / Nador**	Transit-to-settlement zone; migrants blocked from Spain	Sub-Saharan African (stranded transit)	**Volatile** *Transit zone blocked from Spain; enforcement crackdowns periodic; migrants in unstable semi-permanent limbo.*

Morocco	**Marrakesh / Agadir**	Growing sub-Saharan settlement; tourism economy absorbs informal labour	Sub-Saharan African labour migrants	**Emerging** *Tourism and agriculture absorbing informal sub-Saharan labour; emerging as secondary informal settlement zone.*

Sources: UNHCR Country Fact Sheets & Operational Updates 2024–2026 | ILO UAE/Saudi Country Profiles | GASTAT Labour Market Statistics Q3 2024 | ACAPS Country Pages | Carnegie Endowment/HCP Morocco Census 2024 | Destatis/Grokipedia Berlin 2024 | Dubai Statistics Centre 2024–2025 | data.unhcr.org

Are There Ideal Settlement Hubs?

The concept of an **ideal settlement hub** refers to locations within destination countries that have been formally identified by governments, international organizations, or policy frameworks as optimal for long-term migrant integration based on economic absorption capacity, existing infrastructure, policy environment, and diaspora network density. This section synthesizes findings from national settlement policies, the EU-MENA partnership framework, and IOM regional analysis to identify the most discussed and viable settlement zones across the eight destination countries covered in this research.

The dominant finding from the EU-level review is that international discussion centers on containment, not settlement. Between 2021 and 2024, the EU committed €906 million to migration actions in North Africa, primarily border control. Egypt and Morocco were designated on the EU's first list of safe countries of origin in December 2025, facilitating faster deportations, while the EU's Return Regulation (agreed December 2025) enables offshore detention hubs in MENA. The **Jordan Compact,** linking EU trade concessions to refugee work permits, remains the one genuine settlement-oriented policy framework in the region. For the UAE and Saudi Arabia, the concept of an ideal settlement hub does not apply: both operate kafala (employer sponsorship) systems with no asylum framework or permanent residency pathway.

Key settlement hubs by destination country:

Germany: The Königstein Key distributes asylum seekers across 16 states by tax revenue and population. North Rhine-Westphalia (21% quota), Bavaria, and Baden-Württemberg are the primary settlement states. Employment unlocks freedom of movement, making industrial western Germany the main integration gateway. Germany's Skilled Workers Immigration Act (2023) explicitly signals demand for continued labour migration in healthcare, construction, and engineering, making it the only destination country in this analysis with formal legislative appetite for expanded intake from MENA.

Turkey: Government-designated interior provinces, Gaziantep, Konya, and Kayseri, are the preferred settlement zones, specifically to relieve pressure on border regions like Hatay. Gaziantep hosts the largest Syrian business community in Turkey with 14,000+ Syrian-owned enterprises. Syrians in Turkey hold Temporary Protection Status (TPS), which permits work authorization but provides no permanent residency pathway. Absorption capacity is driven primarily by textile manufacturing, food processing, and cross-border trade, sectors with significant informal labour demand.

Jordan: Mafraq Governorate (home to Za'atari camp, 78,000 residents) and Irbid are the primary integration zones under the Jordan Compact framework. Over 450,000 work permits issued nationally as of March 2024; northern cities are deeply embedded in local manufacturing economies.

Morocco: Casablanca and Rabat are the core integration hubs under Morocco's National Strategy for Immigration and Asylum (SNIA, 2014). UNHCR operates Protection Working Groups in both cities. Casablanca holds the largest share of Morocco's 142,152 registered foreign residents per the 2024 census. Absorption capacity is driven primarily by informal labour in construction, domestic work, and street trade, with formal integration pathways limited to SNIA regularization rounds. Morocco's legal framework permits residency renewals but provides no formal asylum status under international law.

Egypt: Greater Cairo (Cairo, Giza, 6th October City) hosts the majority of Egypt's 877,000+ registered refugees under a no-camp policy. Egypt's December 2024 Asylum Law (No. 164/2024) creates for the first time a formal legal settlement framework with a pathway to citizenship, a significant policy shift. In practice, absorption capacity is constrained by Egypt's own economic pressures: the IMF programmed (2024–2027) has cut subsidies and raised unemployment, limiting formal labour market integration. The no-camp policy forces refugees into urban labour markets with minimal institutional support beyond UNHCR registration.

Sources: BAMF Germany | Migration Policy Institute Jordan | UNHCR Jordan & Morocco | IOM Morocco | Baker Institute Egypt | EU Council December 2025 | Carnegie Endowment Morocco 2026

Climate Specific Overlay: High-Risk Origin Provinces

The table below identifies origin countries in the MENA migration network that face the most acute projected climate hazards, specifically drought, extreme heat stress, water scarcity, groundwater depletion, and agricultural collapse and maps the highest-risk provinces within each country. These are the provinces most likely to generate outbound migration flows driven by climate in the 2026–2030 horizon. Risk level is assessed based on IPCC AR6, ND-GAIN Index, World Bank CCDR, UNESCO, IEA, and OCHA subnational data. Population figures use the most recent official census or UN-endorsed estimates available for each country.

Country	Province / L2	Primary Climate Hazard	Risk	Current Population	Migration Driver
Yemen	**Hadramawt**	Groundwater depletion (2–6m/yr); cyclone exposure; desertification	CRITICAL	**~1.2M** *(OCHA/CSO 2024 est.)*	Agricultural collapse + cyclone exposure forces permanent departure. No adaptive capacity, migration is the only viable response. (IOM 2024; Sana'a Center)
Yemen	**Taiz**	Water table collapse; flash floods; landslides; extreme heat	CRITICAL	**~3.2M** *(OCHA/CSO 2024 est.)*	Water table collapse destroys terraced agriculture; flash floods displace communities seasonally. Most densely populated climate-stressed province — resource pressure exceeds absorptive capacity. (IOM 2024; UNDP)
Yemen	**Marib**	Drought + flash flooding compound; groundwater depletion	VERY HIGH	**~1.1M incl. 900K IDPs** *(OCHA HNO 2023)*	Climate shocks compound conflict displacement, floods destroy IDP assets while drought removes agricultural fallback. 1,340 IDP families displaced by floods alone. (OCHA 2023; IOM 2024)
Iraq	**Basra**	Extreme heat (51°C+); saltwater intrusion; water contamination	CRITICAL	**3,664,168** *(Iraq Census Nov 2024)*	Water contamination + 51°C heat makes habitation untenable. Tigris-Euphrates output down 30–40% over 40 years. 2018 water crisis hospitalized 118,000 in Basra alone. (IEA; UNESCO Jan 2026)
Iraq	**Thi-Qar & Maysan**	Water scarcity; Al-Gharraf River shrinkage; agricultural collapse	CRITICAL	**~2.2M est.** *(Iraq MoP 2024 proportional)*	Al-Gharraf River shrinkage eliminates drinking water + irrigation for 4M+ people. No alternative source, relocation is forced. (UNESCO Jan 2026; USIP)
Iraq	**Nineveh (Mosul)**	Reservoir depletion; water rationing; heat stress (40°C+)	HIGH	**4,261,980** *(Iraq Census Nov 2024)*	Mosul Dam reservoir depletion forces water rationing; agriculture and municipal supply failing. Projected 20–40 additional days above 40°C compounds stress. (UNESCO Jan 2026; IEA)
Sudan	**North & West Darfur**	Drought; desertification; Saharan advance 1.5km/yr	CRITICAL	**~2.8M (North Darfur)** *(UNICEF State Profile)*	Recurring drought eliminates rainfed farming, triggering resource competition between pastoralists and sedentary farmers, the documented driver of the 2003 Darfur crisis. Urbanization jumped 20%→50% since 2003. (ACAPS 2023; ICRC)
Sudan	**North & West Kordofan**	Drought; rainfed agriculture collapse; erratic rainfall	CRITICAL	**~2.9M est.** *(CBS 2008 pre-war baseline)*	19M ha rainfed land under drought threat as agro-climatic zone shifts south. Pastoralist-farmer conflicts over shrinking resources drive displacement. (ICRC 2024)
Sudan	**Northern State**	Desertification; Sahara encroachment; extreme heat	HIGH	**~900K–1M est.** *(CBS 2008 projection)*	Sahara advancing at 1.5km/year removes Northern State from viable farmland. Warming at 2× global average. No alternative livelihoods — out-migration is the structural outcome. (ACAPS 2023; World Bank)

Afghanistan	**Helmand**	Drought; groundwater depletion; agricultural collapse	**CRITICAL**	**~1.56M** *(OCHA/Flowminder 2021)*	Most severe drought anomalies of any Afghan river basin; groundwater depletion irreversible. IPC Phase 4 Emergency, crop failure eliminates the livelihood base. (ACAPS 2024; OCHA)
Afghanistan	**Kandahar**	Drought; well collapse; extreme heat; dust storms	**CRITICAL**	**~1.37M** *(OCHA/Flowminder 2021)*	Well collapse eliminates water access for communities with no piped infrastructure. ~50% of families in documented villages abandoned homes after wells dried up. (Save the Children 2024)
Afghanistan	**Herat**	Drought + flooding; heat waves; earthquake compound (2023)	**VERY HIGH**	**~2.10M** *(OCHA/Flowminder 2021)*	Compound hazard stack, drought, floods, dust storms, earthquakes, exceeds adaptive capacity. Border location feeds into Herat→Iran corridor in Sankey. (UNAMA Oct 2023)
Egypt	**Kafr el-Sheikh, Damietta, Port Said (N. Delta)**	Sea level rise; land subsidence; saltwater intrusion	**CRITICAL**	**Kafr el-Sheikh ~3.8M** *(CAPMAS 2025)*	Saltwater intrusion destroys farmland + freshwater wells. IPCC projects 2,660 km² submerged by 2100; land subsidence accelerating the timeline. (IPCC AR6; UNDP/GCF)
Egypt	**Aswan & El-Minya (Upper Egypt)**	Extreme heat (+5.49°C by 2100); Nile water stress; drought	**CRITICAL**	**Aswan ~1.7M; El-Minya ~6.5M** *(CAPMAS 2025)*	Aswan warming +5.49°C by 2100, highest of any Egyptian governorate. Nile projected to shrink 19–32%, destroying irrigated farming and driving northward migration to Cairo. (Carnegie Endowment 2023)
Egypt	**Beheira & Alexandria (coast)**	Sea level rise; Alexandria sinking 3mm/yr; saltwater intrusion	**VERY HIGH**	**Beheira ~7.0M** *(CAPMAS 2025)*	Alexandria sinking 3mm/yr compounds sea level rise. A 50cm rise displaces 2M people and eliminates 214,000 jobs in Alexandria alone. (Baker Institute 2024)
Morocco	**Drâa-Tafilalet**	Hyper-arid desertification; surface runoff –55–63%; Saharan expansion	**CRITICAL**	**1,655,623** *(HCP Morocco Census 2024)*	Surface runoff down 55–63% from baseline; oasis agriculture collapsing as Sahara advances. Farming failure drives rural→Casablanca→Europe migration chain. (IPCC AR6; EU JRC 2024)
Morocco	**Souss-Massa**	Groundwater depletion; saltwater intrusion; export agriculture collapse	**HIGH**	**3,020,431** *(HCP Morocco Census 2024)*	Groundwater depletion + saltwater intrusion threatening export agriculture (citrus, tomatoes, avocados). Crop collapse removes formal wage employment, accelerating emigration. (IPCC AR6; World Bank)
Algeria	**Biskra / Adrar / Tamanrasset (Saharan wilayas)**	Extreme heat (48°C+); desertification; precipitation collapse	**CRITICAL**	**Biskra ~721K; Adrar ~402K; Tamanrasset ~115K** *(ONS Algeria 2008 census — most recent available)*	Warming at 0.49°C/decade; Saharan provinces routinely exceed 48°C, physiologically uninhabitable in summer. Desertification eliminates pastoralist + oasis economies with no alternative livelihoods. (IEA)
Tunisia	**Kairouan**	Drought; river discharge collapse; agricultural failure	**CRITICAL**	**600,803** *(INS Tunisia Census 2024)*	Annual discharge down 41–58% from baseline. Kairouan, Tunisia's agricultural heartland, bears the full impact of crop failure and unpredictable rainfall. (IPCC AR6; EU JRC 2024)
Tunisia	**Médenine & Tataouine (far south)**	Desertification; Saharan expansion; extreme heat; water scarcity	**HIGH**	**Médenine ~520K; Tataouine ~165K est.** *(INS Tunisia 2014/2017 est.)*	Severest desertification in Tunisia; lowest rainfall + highest heat stress means no agricultural fallback. Primary transit zone toward Libya, climate stress feeds directly into Central Mediterranean migration route. (IPCC AR6; EU JRC 2024)
Iran	**Sistan and Baluchestan**	72% rainfall decline; Hamoun wetlands dried; extreme heat; dust storms	**CRITICAL**	**~3.2M** *(SCI 2023 projection)*	72% rainfall decline dried the Hamoun wetlands, destroying fishing and farming livelihoods. 'Water bankruptcy' declared 2025, mass departure already underway. (Carnegie Endowment 2025; Atlantic Council)
Iran	**Khuzestan**	Water diversion; groundwater collapse; 50°C+ heat; dust storms	**CRITICAL**	**~5.3M** *(SCI 2023 projection)*	Karun River diverted away, Hoor-al-Azim wetlands dried, catastrophic dust storms. Ahvaz hits 50°C+. 'Uprisings of the thirsty' in 2018, 2021, 2025. (Atlantic Council 2024)

Iran	**Isfahan / Yazd / Kerman (central plateau)**	Zayandeh River dry; aquifer collapse; D3–D4 exceptional drought	**VERY HIGH**	**Isfahan ~5.48M; Yazd ~1.25M; Kerman ~3.3M** *(SCI 2023 projection)*	Zayandeh River dry for years; central plateau water reliability collapsed. WWA confirmed climate changed a 50–100yr drought into a recurring 10yr event. Mass departure already underway. (WWA Nov 2025; Inside Climate News)

Risk levels: CRITICAL = acute, documented displacement already occurring + highest projected future hazard intensity; VERY HIGH = severe hazard documented, displacement emerging; HIGH = significant hazard with growing pressure on livelihoods.

Population data sources: Yemen OCHA/CSO 2024 HDX projections | Iraq Iraqi Ministry of Planning Census Nov 2024 | Sudan UNICEF/OCHA State Profiles (2008 CBS baseline) | Afghanistan OCHA/Flowminder 2021 | Egypt CAPMAS 2025 | Morocco HCP RGPH Census 2024 | Algeria ONS 2008 census (most recent available) | Tunisia INS Census 2024 | Iran Statistical Center of Iran 2023 projection (2016 census base).

Religion-Specific Insight: Muslim-Majority Countries as Hosts

The central finding of this review is that no Muslim-majority country in the MENA migration network extends formally religion-based preferential asylum or residency rights to Muslim migrants. Shared religious identity influences political **rhetoric** across virtually all countries studied but has not been translated into legal frameworks. The most significant hosting is driven by geopolitical calculation, donor incentives, and labour market demand, not Islamic solidarity. **Jordan** and **Turkey** remain the two most consequential Muslim-majority refugee hosts by volume (1.3M and 2.5M respectively), but both frame their role in economic and humanitarian terms rather than Islamic ones. In the Gulf states, the kafala sponsorship system governs all migrants as temporary labour regardless of faith, and none has ratified the 1951 Refugee Convention. **Pakistan** and **Iran**, once the world's two largest Muslim hosts of Afghan refugees (3M and 4.5M respectively), have undergone the most dramatic reversals in the dataset, replacing Islamic solidarity with mass deportation campaigns that expelled over 2.4 million Afghans between 2023 and 2025.

The table below summarizes the religion-specific policy posture, key recent changes, and overall reception trend for each country:

Country	Religion-Specific Policy	Key Policy Change (2023–2026)	Reception Trend
Turkey	Discursive only, AKP "Islamic solidarity" rhetoric (muhacir/ensar framing). No legal religion-based preference.	Post-Assad Syrian returns (400K+ by Aug 2025); 2024 petition to strip citizenship from 238K Syrians	**Sharply restrictive**
Jordan	None, Arab/humanitarian framing, not Islamic. Jordan Compact excludes non-Syrian Muslims (e.g. Sudanese deported)	Jordan Response Plan 2024–2026; work permits expanded to all sectors; 157K Syrian returns since Dec 2024	**Stable but strained**
Saudi Arabia	De facto informal only, 400K+ Yemenis, 670K Syrians, 250K Rohingya regularized as "indirect asylum." Not codified in law.	Kafala system formally abolished June 2025, workers no longer require employer sponsor	**Ambiguous economic pragmatism dominates**
UAE	None, kafala governs all migrants regardless of religion. No asylum framework.	Selective residency reforms for investors/skilled only;	**Unchanged kafala persists**
Qatar	Unique: only GCC state with a domestic refugee law. Does not explicitly privilege Muslims.	Post-World Cup labour reforms stalled; core protections unmet per GLMM 2024	**Neutral**
Egypt	None, no-camp policy applies to all nationalities regardless of religion.	Asylum Law No. 164/2024: first-ever citizenship pathway. Simultaneously: 18,000 Sudanese deported in 2024	**Increasingly restrictive**
Lebanon	None, confessional system complicates Muslim solidarity. No Convention signatory, no domestic asylum law.	March 2026 conflict displaced 667K in one week, Lebanon now an origin, not a host	**Rapidly deteriorating**
Pakistan	Collapsed, was Islamic solidarity (Sunni-Afghan ties). Never codified in law.	IFRP 2023: 1.7M Afghans deported Sept 2023–Nov 2025; $830 UN-condemned exit fee imposed	**Completely reversed**
Iran	Collapsed, was Persian-Islamic solidarity. Amayesh cards restrict employment, movement, education.	750K Afghans deported 2024; millions more announced for 2025; Iran war 2026 ends hosting capacity	**Collapsed**

Morocco	None, SNIA (2014) is rights-based, not religion-based. Hosts religiously diverse refugee populations.	EU designated Morocco "safe country of origin" 2026; €624M EU deal (2024–27) for border containment	**Shifting to gatekeeper**
Kazakhstan	None, 1951 Convention signatory with national asylum law but tiny scale (~600 refugees hosted).	Ashgabat Declaration 2024; Taliban de-listed from terrorist registry end of 2023	**Cautiously engaged, security-first**
Uzbekistan	None, has not ratified 1951 Convention. No national asylum system.	Accepted 2023 UPR recommendations to ratify Convention; UNHCR analytical framework commissioned	**Neutral no framework**
Albania	None, constitutionally secular. EU accession drives all policy, not Islamic identity.	EU4MIGRATION: €10M project launched June 2025; Italy-Albania offshore processing deal (2024)	**Fully EU-aligned, secular**

Religion-Related Laws and Policy Changes (2023–2026)

The most significant legislative development is Egypt's Asylum Law No. 164/2024 (December 2024), the first domestic asylum law in Egypt's history, including a formal pathway to citizenship for refugees. In practice, it transferred refugee status determination from UNHCR to a government committee and coincided with mass deportations of ~18,000 Sudanese refugees in 2024 (Human Rights Watch; Amnesty International). Saudi Arabia's June 2025 abolition of the kafala system formally removes the employer-sponsorship requirement for millions of Muslim migrant workers from Pakistan, Yemen, Bangladesh, and Egypt, though reforms primarily benefit skilled and white-collar workers (Arab America 2025; GLMM 2024). In Turkey, no new religion-specific legislation was passed, but a 2024 opposition petition sought to revoke Turkish citizenship granted to 238,000 Syrians (Journal of Immigrant & Refugee Studies, 2025). Kazakhstan's 2024 Ashgabat Declaration on Ending Statelessness and its de-listing of the Taliban from its terrorist registry (end of 2023) signal cautious re-engagement with Afghan Muslim populations in Central Asia (UNHCR Kazakhstan MCO Annual Results 2024). Albania launched its National Strategy on Migration 2024–2030 and the €10M EU4MIGRATION project (June 2025), aligned entirely with EU accession requirements and carrying no religious dimension (IOM Albania; EEAS 2025).

Shifts in Religious and Social Dynamics

The most analytically striking pattern across the 13 countries is the decoupling of Islamic identity from hosting generosity. **Turkey** is the clearest case: the AKP government initially mobilized Islamic concepts of **muhacir** and **ensar** to justify Syrian reception, explicitly framing it as a modern-day hijra. By 2023, this had collapsed, the share of Turks perceiving Syrians as persecution victims fell from 57% to 26%, and July 2024 anti-refugee riots in Kayseri illustrated how thoroughly economic anxiety had displaced religious solidarity (Oxford Foreign Policy Analysis, 2026; AIDA 2025). In the **Gulf,** Islamic rhetoric coexists with a governance architecture, kafala, that treats Muslim migrant workers as economic inputs rather than co-religionists. Saudi Arabia's Vision 2030 has further de-emphasized religious identity in favour of economic branding. Qatar's use of Islamic rhetoric is concentrated in foreign policy (Palestine, Al Jazeera) and does not shape domestic migrant governance. **Pakistan and Iran** represent the sharpest reversals: four decades of hosting Afghan Muslims under Islamic and cultural solidarity frameworks were dismantled in two years. In Pakistan, officials cited terrorism and economic burden; in Iran, nationalist hashtags calling for Afghan expulsion trended nationally as government officials announced deportation of up to two million (The New Humanitarian, 2025; FIDH, 2025). Notably, Iran's sectarian split, Shia host society, majority Sunni Pashtun refugees, meant Islamic solidarity was always partial, and it evaporated under economic and security pressure. In **Central Asia,** Kazakhstan and Uzbekistan are experiencing an Islamic cultural revival post-Soviet era, but governments remain security-first and have not translated this into generous refugee frameworks, Kazakhstan hosts only ~600 formal refugees despite a signed Convention. **Albania** represents the unique case of a Muslim-majority (57%) country where religious identity is entirely absent from policy, EU accession has fully supplanted any Islamic identity dimension in governance, making Albania a secular European candidate state that processes Italian-intercepted migrants offshore.

Sources: Comparative Migration Studies (Springer, 2016) | Oxford Foreign Policy Analysis (2026) | AIDA Asylum Information Database (2025) | Journal of Immigrant & Refugee Studies (2025) | UNHCR Syria Regional Response Turkey (2025) | Oxford International Journal of Refugee

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Policy Recommendations: Destination Countries Ranked by Migrant Stock

The following recommendations are organized by destination country, ranked by cumulative 2021–2025 migration stock from the O-D baseline matrix. Every recommendation traces directly to documented findings in this report. The table below provides a summary reference; the substantive analysis follows.

Rank	Country	Cumulative Stock 2021–2025	Core Recommendation
#1	Saudi Arabia	6,877,661	Extend kafala abolition to domestic workers; mandate sector portability; no religious preferential framing
#2	Jordan	2,931,406	Expand Jordan Compact to all refugees (not Syria-only); fix agricultural sector permits; pilot 3D housing at Za'atari
#3	Turkey	2,895,857	Remove 1951 Convention geographical limitation; grant full status not TPS; halt citizenship revocation threats
#4	Pakistan	2,517,416	Ratify 1951 Convention; cease IFRP deportations; recognize UNHCR PoR digital documentation as non-deportable
#5	Iran	2,497,514	Halt mass deportations; restore Amayesh card protections; prevent secondary displacement crisis from Iran war
#6	Germany	1,468,723	Expand Skilled Workers Act to vocational MENA fast-track; pre-approve climate-crisis province migrants; decentralize Königstein Key
#7	Lebanon	1,214,399	Accede to 1951 Convention; develop minimum domestic asylum framework; prioritize conflict-crisis relief 2026
#8	Egypt	881,560	Implement biometric digital ID before UNHCR transfer; build skills registry for 800K+ refugees; enforce asylum law in good faith
#9	France	499,375	Fast-track Algeria→France corridor processing; expand bilateral labour migration agreements with North Africa
#10	Libya	392,338	Cannot function as host EU must redirect funding from Libyan coast guard to formal resettlement pathways

#1 Saudi Arabia | Cumulative Stock: 6,877,661

Saudi Arabia is the largest single destination in the MENA migration network by volume, absorbing labour flows from Pakistan, Yemen, Egypt, Sudan, Jordan, and Lebanon. The dominant structural problem is **kafala:** a system that ties millions of Muslim migrant workers' legal residency to a single employer, enabling overwork, restricting movement, and preventing any pathway to permanent settlement. Saudi Arabia's June 2025 abolition of kafala is the most significant structural reform in Gulf migration governance in a generation, but it will mean nothing if enforcement mechanisms are absent and the domestic worker sector (estimated at 30% of the labour force) remains excluded.

Saudi Arabia must implement kafala abolition comprehensively: it must extend to domestic workers, include sector portability (workers must be able to change industries without losing residency), and include a formal grievance mechanism with access to labour courts. The 2023 Executive Regulations amended the Nationality System but did not create a pathway to permanent residency for long-term migrant workers, this gap must be closed. The informal de facto accommodation of 670,000 Syrians, 400,000 Yemenis, and 250,000 Rohingya as "guests" rather than recognized asylum seekers reflects a legal fiction that leaves millions vulnerable to sudden policy reversal. Saudi Arabia should formalize these populations' status and ratify the 1951 Refugee Convention. It has the financial resources to build a model legal framework, and the reputational incentive to do so under Vision 2030.

#2 Jordan | Cumulative Stock: 2,931,406

Jordan is the most policy-rich case in the dataset and the one where targeted reform would yield the highest returns per dollar spent. The core problem is the **Syrian exclusivity** of the Jordan Compact framework. Jordan hosts 638,760 registered Syrian refugees but also 61,081 Iraqis, 12,772 Yemenis, and 5,163 Sudanese, yet the Compact's work permit framework applies almost exclusively to Syrians. Non-Syrian refugees are effectively invisible to the labour integration system. This is not a resource constraint; it is a policy choice, and one that is becoming increasingly untenable as Sudanese inflows grow.

Jordan must extend Jordan Compact work permit rights to all registered refugees, not only Syrians. The agricultural sector demands immediate attention: the 2023 death of eight Syrian farm workers packed into unlicensed trucks in Mafraq, workers illegally transported to avoid police, is the most concrete documented case of what informal, unprotected agricultural labour looks like in practice. Jordan must create a dedicated agricultural work permit category with transport, housing, and safety standards attached. On housing: Za'atari camp (78,000 residents) and Azraq are running on tent infrastructure that is both expensive to maintain and degrading to inhabit. Jordan should pilot 3D printed modular permanent housing in Za'atari, ICON and similar companies have demonstrated this technology at scale in displacement contexts and use it to systematically replace temporary shelter with durable, low-cost housing that reduces the camp's per-capita operating cost over a 10-year horizon. The Jordan Response Plan 2024–2026 provides the institutional framework; what is missing is the political will to extend it beyond Syrians and the infrastructure ambition to move beyond tents.

#3 Turkey | Cumulative Stock: 2,895,857

Turkey's problem is structural and political simultaneously. It hosts 2.9 million Syrians under **Temporary Protection Status**, a legal designation that provides no permanent pathway and can be revoked at any time. Turkey maintains a geographical limitation on the 1951 Refugee Convention, meaning it will only grant full refugee status to Europeans. Every non-European asylum seeker in Turkey, Syrian, Afghan, Iranian, lives in permanent legal precarity regardless of how long they have resided there.

Turkey must remove the 1951 Convention geographical limitation and grant full refugee status, not TPS, to qualifying asylum seekers from non-European countries. The 2024 opposition petition to strip citizenship from 238,000 naturalized Syrians, and the government's failure to firmly reject it demonstrates how fragile even citizenship-level integration is when it is not backed by a durable legal architecture. On Digital ID: Turkey should make UNHCR biometric data fully interoperable with its own Ministry of Labour systems so that Syrian workers with valid TPS documentation can access formal employment without employer-linked vulnerability. The climate overlay in this report identifies Hadramawt, Taiz, and Marib as Yemen's highest-risk origin provinces, and Sistan-Baluchestan and Khuzestan as Iran's, Turkey should pre-establish fast-track registration protocols for documented climate migrants from these provinces, positioning itself as the regional leader in climate-linked protection rather than waiting for the next crisis to improvise.

#4 Pakistan | Cumulative Stock: 2,517,416

Pakistan's deportation of 1.7 million Afghan Muslims between September 2023 and November 2025 under the banner of national security, while invoking Islamic brotherhood in international forums represents the starkest policy hypocrisy in this dataset. Pakistan has hosted Afghan refugees for over 40 years using a colonial-era Foreigners Act of 1946 as its sole legal framework. a statute that grants authorities virtually unlimited detention and deportation powers with no due process protections. This is not an administrative gap; it is a deliberate legal architecture of disposability.

Pakistan must immediately ratify the 1951 Refugee Convention and establish a formal domestic refugee law. UNHCR Proof of Registration (PoR) cards and Afghan Citizen Cards must be legally recognized as non-deportable status, the current system in which even valid-card holders face arrest and expulsion violates the principle of non-refoulement. The $830 exit fee imposed in 2023 on Afghans awaiting resettlement was condemned by the UN as unprecedented; it must be permanently abolished. Internationally, donor governments should make development aid to Pakistan conditional on adherence to non-refoulement standards, the current unconditional aid relationship incentivizes continued mass expulsion.

#5 Iran | Cumulative Stock: 2,497,514

Iran is simultaneously the world's second-largest refugee host (4.5 million Afghans) and one of the most aggressive deportees of that same population, deporting 750,000 in 2024 alone and announcing millions more for 2025. The Iran war of 2026 has fundamentally altered this calculus: Iran can no longer be considered a functioning host country. The priority must shift from integration recommendations to **harm reduction**, preventing secondary displacement crises from compounds of war and deportation.

Iran must immediately halt mass deportations and restore Amayesh card protections for registered Afghan refugees, the alternative is creating a displacement crisis within the displacement crisis, forcing hundreds of thousands back into a Taliban-controlled Afghanistan from which they originally fled. The international community, UNHCR, IOM, and donor states, must establish emergency processing centers at the Iran-Afghanistan border to prevent mass refoulement from becoming the de facto policy. Iran ratified the 1951 Convention in 1976; its current deportation campaign is a clear and documented violation of its international obligations. The Iran-Iraq border, identified in the Sankey data as a growing 300,000-person annual corridor, should be the focus of immediate trilateral engagement between Iran, Iraq, and UNHCR to manage civilian movement that will inevitably intensify with ongoing conflict.

#6 Germany | Cumulative Stock: 1,468,723

Germany is the only destination country in this analysis that has explicitly legislated for expanded labour migration demand through the 2023 Skilled Workers Immigration Act, making it structurally the most receptive country in the dataset to continued MENA inflows. The core inefficiency is the Königstein Key distribution system, which geographically allocates asylum seekers by state tax revenue and population, creating bottlenecks in industrial western states (NRW at 21%) and mismatches between where migrants are assigned and where economic demand for their labour actually exists.

Germany must expand the Skilled Workers Immigration Act to include a vocational fast-track for documented migrants from MENA conflict zones with verifiable skills in healthcare, construction, and engineering, the three sectors Germany's own demographic projections identify as critically understaffed by 2030. The climate overlay in this report provides a direct evidence base for pre-processing: Germany should establish pre-arrival fast-track agreements with UNHCR for migrants from Helmand (Afghanistan), Basra (Iraq), and Sistan-Baluchestan (Iran), the three highest CRITICAL-rated climate origin provinces, allowing documented climate migrants to enter skills matching systems before displacement becomes acute. The Königstein Key should be reformed to include employment proximity as a weighting factor alongside tax revenue and population. placing migrants closer to their actual labour market destinations reduces the secondary movement patterns that currently frustrate integration policy.

#7 Lebanon | Cumulative Stock: 1,214,399

Lebanon is, as of March 2026, not a functioning host country. It is an active displacement origin. The March 2026 conflict displaced 667,000 people in a single week, adding to a population already hosting over 1 million Syrian refugees in a country of 5 million. Lebanon has not signed the 1951 Refugee Convention, has no domestic asylum law, applies kafala to domestic workers, and has a confessional political system that turns every migration question into a sectarian battleground.

The immediate priority for Lebanon is conflict crisis relief, not migration management reform. However, the international community must stop treating Lebanon's refugee hosting as a permanent solution and begin funding voluntary safe return corridors to post-Assad Syria at scale, the 157,000 Syrian refugees who returned from Jordan since December 2024 demonstrate this is now viable for a significant subset. For the medium term: Lebanon must accede to the 1951 Convention and establish a minimum domestic asylum framework as a precondition for continued EU migration partnership funding. The EU cannot credibly designate Lebanon as a migration partner while it has no legal framework for the 1 million people it is nominally hosting.

#8 Egypt | Cumulative Stock: 881,560

Egypt's December 2024 Asylum Law No. 164/2024 is textually progressive, it creates Egypt's first-ever citizenship pathway for refugees, and operationally alarming. The law transfers refugee status determination from UNHCR to a new government committee without an agreed transition protocol, while simultaneously Egyptian Border Guard Forces deported an estimated 18,000 Sudanese refugees in 2024. Egypt is playing both sides: cultivating humanitarian credibility with the EU (which pledged €7.4 billion in 2024) while conducting mass expulsions that violate the same international law it is publicly committing to.

Egypt must implement biometric Digital ID registration for all 800,000+ UNHCR-registered refugees before transferring status determination to the national Permanent Committee, transferring 800,000 files without a digital registry is an administrative collapse waiting to happen. Egypt should build a national skills registry for its refugee population: the Sudanese professional class driven into Egypt since April 2023 includes engineers, doctors, and educators who are currently working informally or not at all. A functioning skills registry, linked to Egypt's Vision 2030-equivalent economic programmes, would convert a humanitarian liability into an economic asset. Egypt must also halt all deportations to Sudan, deporting people to an active war zone in which 10 million people are displaced is refoulement by any legal definition, regardless of Egypt's domestic asylum law.

#9 France | Cumulative Stock: 499,375

France's position in the MENA migration network is defined primarily by the Algeria→France corridor — Algeria is France's #1 country of birth of foreign-born residents (17% of 9.3 million), and the OECD International Migration Outlook 2025 confirms approximately 50,000 new annual Algerian arrivals. France's January 2024 immigration law raises language requirements for residency and naturalization (B1 for residency, B2 for naturalization) a reform that effectively disadvantages migrant workers with vocational rather than academic language skills.

France should formalize and expand the Algeria→France labour migration corridor through a dedicated bilateral framework, the current system processes Algerians through the same general immigration channels as all other nationalities, creating backlogs and informality that pushes migrants toward irregular status. The 2024 immigration law's regularization provision for undocumented workers in shortage sectors is a model worth expanding, France should extend it beyond the 12-month employment threshold to 6 months in critical shortage occupations (healthcare, agriculture, construction). France must also address the Mayotte situation directly: the EU cannot credibly claim a rights-based migration policy while one of its territories is simultaneously proposing to end birthright citizenship and conducting mass deportations of documented migrants.

#10 Libya | Cumulative Stock: 392,338 (transit, not settled)

Libya is not a host country, it is a **transit and detention corridor.** The 392,338 figure represents migrants passing through or trapped in Libya en route to Europe, not a settled population with any form of legal status or protection. Libya has no functioning government capable of implementing a migration policy, no asylum framework, and active human rights documentation of torture, slavery, and death in EU-funded detention facilities.

The EU must stop funding the Libyan Coast Guard as a migration containment mechanism. The €200M+ directed at Libyan interception operations since 2017 has not reduced migration, it has redirected it to more dangerous routes and concentrated vulnerable populations in detention facilities where documented abuses occur. Instead, the EU should redirect this funding to: (1) formal UNHCR-managed resettlement processing centers in Tunisia and Egypt, where migrants can apply for legal pathways without risking the Mediterranean crossing; (2) IOM voluntary return programming for economic migrants who do not qualify for asylum; and (3) climate-specific resettlement quotas for migrants from CRITICAL-rated origin provinces identified in this report's climate overlay. Libya will not become a viable migration partner until it has a functioning state, European policy must accept this reality rather than continuing to pay a non-state actor to perform border management functions it cannot legitimately exercise.

Strategic Conclusions

Three structural failures define MENA migration governance as of 2026, and policy must address all three simultaneously or address none effectively.

First: the EU's strategy of paying Jordan, Morocco, Egypt, and Libya to contain migrants is not a migration policy, it is a containment contract. It incentivizes these countries to restrict integration rather than enable it, creating managed dependency rather than durable solutions. The €7.4 billion to Egypt, €624 million to Morocco, and €906 million across North Africa since 2021 have not reduced migration pressure; they have outsourced its management to states that lack either the capacity or the political incentive to implement rights-based approaches.

Second: Islamic solidarity has proven to be a rhetorical framework, not a policy framework. Pakistan deported 1.7 million Afghan Muslims. Iran deported 750,000 more. Turkey is stripping citizenship from 238,000 naturalized Syrians. The assumption that Muslim-majority states will absorb Muslim migrants out of religious obligation has no empirical basis in 2026, policy must be built on legal frameworks, economic incentives, and burden-sharing agreements, not cultural solidarity that evaporates under economic pressure.

Third: climate displacement has not yet entered formal migration governance frameworks but is already structurally present in the data. The provinces identified in this report's climate overlay, Helmand, Basra, Hadramawt, Sistan-Baluchestan, North Darfur, are not future risks. They are current origin points already generating the flows documented in the 2021–2025 baseline. Every destination country in this analysis should establish a formal **climate-origin fast-track**, a pre-approved processing category for migrants from IPCC-designated high-risk provinces, before the next climate shock generates a crisis that existing frameworks are structurally unable to absorb.

Data sources: O-D Baseline Matrix 2021–2025 (this report) | Emerging Population Hubs Table (this report) | Climate Specific Overlay (this report) | UNHCR Jordan Country Factsheet Sept 2025 | Jordan Compact / Global Compact on Refugees | MERIP Jordan 2024 | Baker Institute Egypt 2025 | HRW Egypt Dec 2024 | Arab America, Saudi Kafala (2025) | GLMM Gulf Migration (2024) | House of Commons Library, Afghan Deportations (2026) | The New Humanitarian (2025) | OECD International Migration Outlook 2025 | AIDA Turkey (2025) | Journal of Immigrant & Refugee Studies (2025) | UNHCR Afghanistan Situation Portal (2025)

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