

SPS Global Insights

Irregular Migration 2024 Outlook



This report explores irregular migration patterns across various regions, encompassing Africa, the Asia Pacific, Europe, the Middle East, and the Americas, analysing the trends and trajectories for 2024.



Sub Saharan Africa



Africa is characterised as a continent that experiences diverse migratory patterns, with labour migration, refugee flows, and internal displacement being some of the most prominent in the world. Over 31 million Africans live outside their country of birth, with the majority engaged in intra-regional migration within Africa. In addition, approximately 25% of African migrants end up in Europe. Conflict, civil unrest, environmental disasters, oppressive regimes, and human rights abuses trigger refugee movements, leading to the establishment of camps in various sub-regions. SSA experiences a dynamic migration landscape that poses significant challenges for businesses operating within the region.

Security issues stemming from migration should be of concern to businesses operating in SSA. Migration driven by political instability, such as that seen across the Sahel, may jeopardise the operational stability of businesses. Since 2020, there have been six coups d'état in francophone West Africa. Niger, Mali, Burkina Faso, Chad, and Guinea have all seen dramatic regime changes, all of which exploited anti-French sentiment to gain popularity. Whilst the coups were relatively peaceful, the long-term impacts on regional security will likely affect migration flows. Looking forward, the absence of French security forces across the Sahel will probably lead to a resurgence in violent militant activity conducted by terrorist groups such as Boko Haram. Migration figures will likely increase as people flee conflict.

Additionally, the ongoing war in Sudan between the Sudanese Armed Forces and the paramilitary Rapid Response Forces has already led to millions being displaced. The UN has said that the conflict has resulted in the world's largest humanitarian displacement crisis. Businesses operating across the Sahel in areas with a significant migrant population may encounter challenges related to civil unrest, protests, disputes, or even violence. The threats related to social cohesion, particularly regarding protests and violent disputes, also pose a direct threat to the safety of employees.

It is worth noting that migration introduces risks related to human trafficking and exploitation, particularly in vulnerable populations, such as those fleeing war. Businesses, especially those reliant on migrant labour, may inadvertently become associated with unethical practices. The exploitation of migrant workers can lead to reputational damage and legal consequences for businesses operating in Sub-Saharan Africa.



Sub Saharan Africa

Businesses also face labour market challenges as a result of migration in the region. Emigration, especially the departure of skilled professionals, may result in talent shortages across key sectors. Businesses reliant on specific skill sets may face challenges in recruiting and retaining skilled workers, impacting productivity and hindering innovation. For example, the emigration of healthcare professionals from countries such as Nigeria contributes to skills shortages in the local market, affecting the quality of healthcare services available to businesses and communities. Labour market disruptions resulting from migration can lead to operational challenges for businesses.

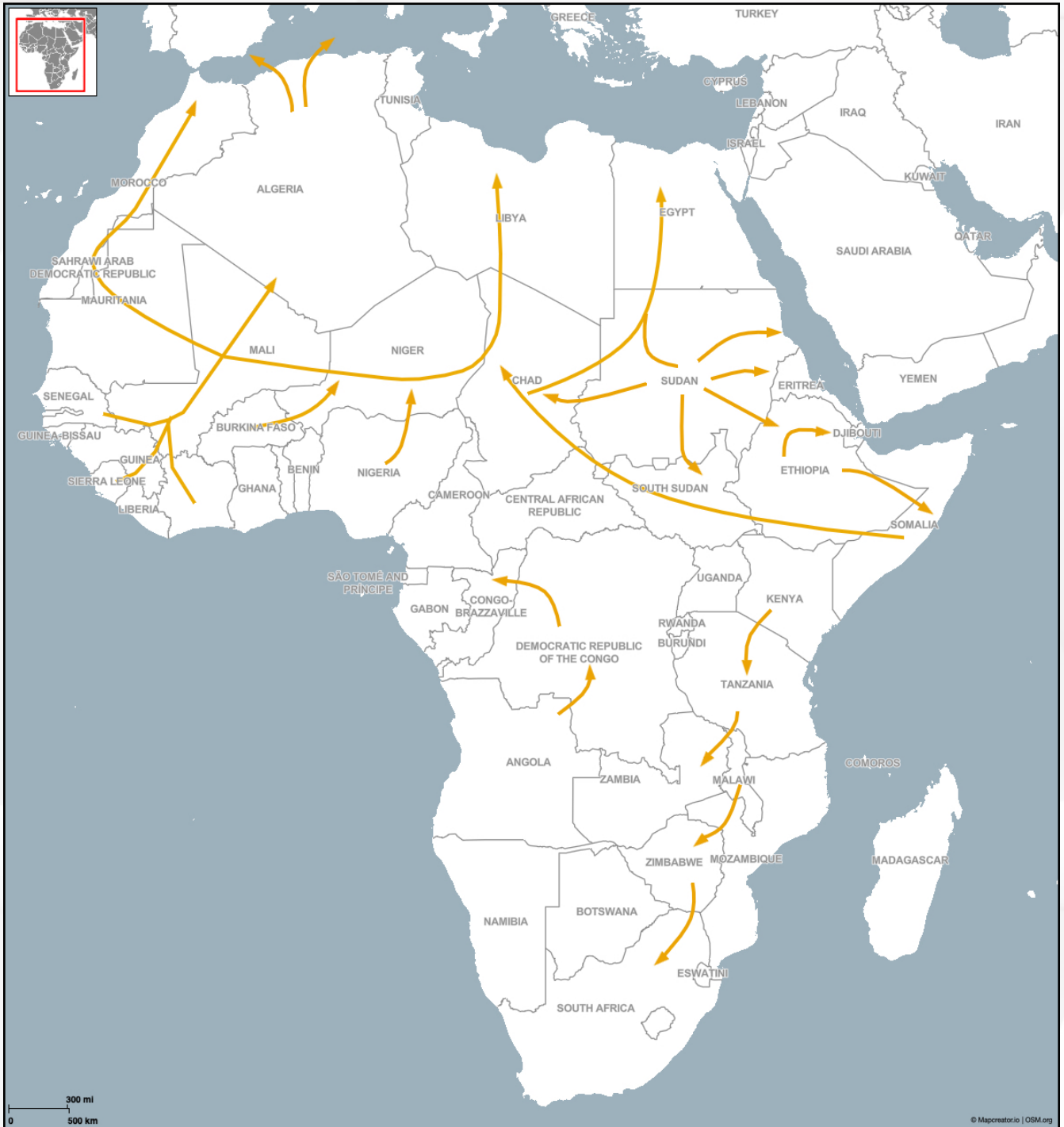
Industries heavily dependent on migrant labour, such as agriculture and construction, may experience workforce shortages, causing delays in production and increasing operational costs. The agricultural sector (fisheries, livestock, forestry and other related activities) has emerged as the largest employer of migrant workers on the continent, employing around a quarter of all migrants in Africa. The majority of migrant workers have basic skills, engaging in elementary occupations in the sector. Nonetheless, agricultural workers are essential. The departure of migrant workers can lead to seasonal labour shortages, affecting planting and harvesting schedules and impacting businesses' bottom lines. Labour market challenges are further exacerbated by a mismatch between available skills and the requirements of the job market. Neglect of technical and vocational education and training contributes to this mismatch, affecting the quality of the workforce and impacting businesses' efficiency.

Finally, governments responding to migration challenges may implement stricter immigration policies, negatively affecting businesses. Businesses relying on migrant workers may encounter changes in visa regulations, impacting workforce availability and operational flexibility. South African businesses have been affected by this, as operational uncertainties are caused by inaccessibility to a consistent workforce as a result of shifting immigration policies. Evolving regulatory landscapes in repossessing migration can also increase compliance burdens. Changes in labour laws, documentation requirements, or additional regulatory hurdles, may pose challenges in managing human resources effectively. Increased documentation requirements in some East African countries, for example, have added administrative burdens for businesses.

The risks associated with migration in Sub-Saharan Africa have far-reaching implications for businesses, spanning security concerns, labour market challenges, and policy and regulation risks. As businesses seek to navigate this complex landscape, it is essential to understand the nuanced dynamics of Sub-Saharan migration and tailor strategies to address these specific challenges. By adopting a proactive approach and engaging with local communities and governments, businesses can contribute to the development of sustainable solutions that mitigate risks and foster a stable and conducive business environment.



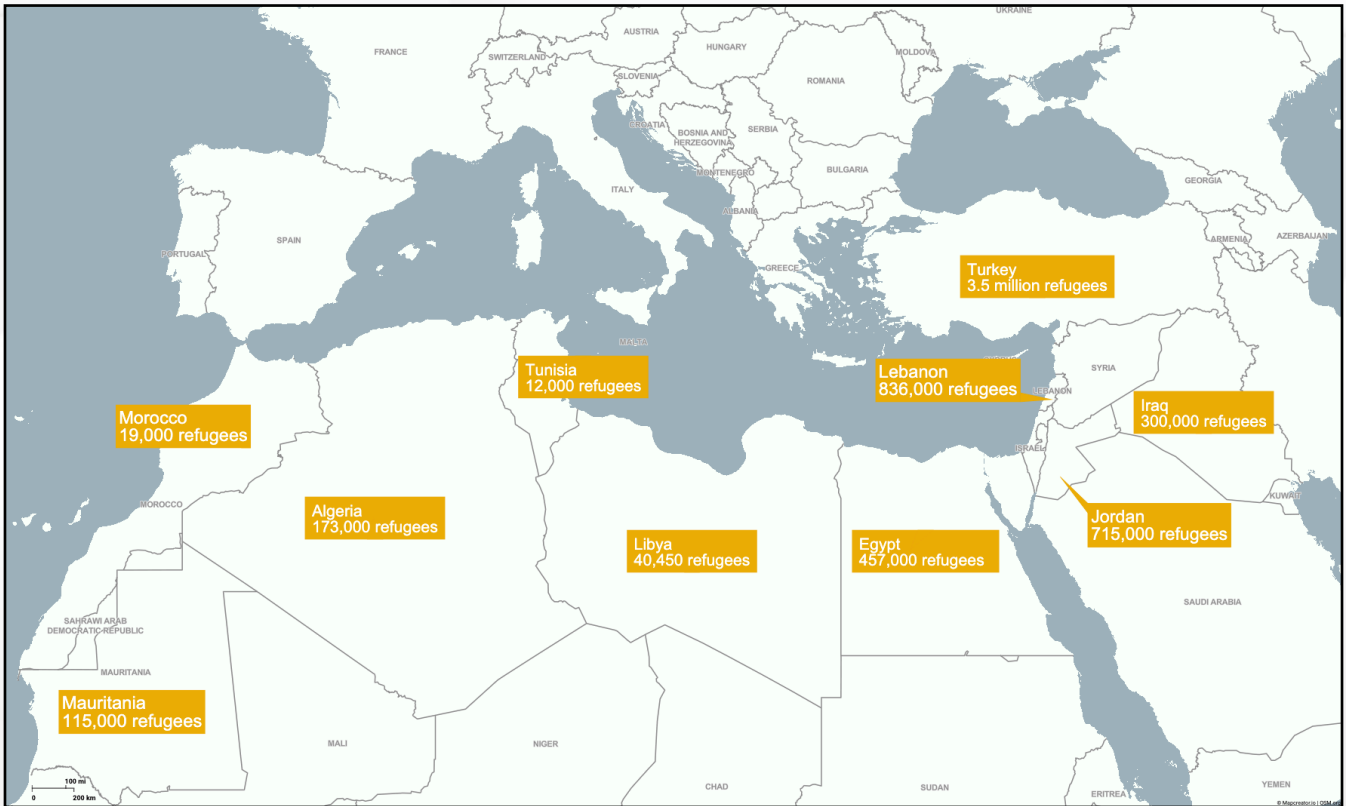
Sub Saharan Africa





Middle East and North Africa

MENA



More than a decade after the 2012 Arab Spring, the Middle East and North Africa (MENA) continue to be a global hotspot of displacement. This has been driven by various factors such as political instability, economic challenges, as well as conflicts. The demographic composition of MENA, with a large youth population, plays a crucial role in shaping migration patterns. Economic disparities, coupled with limited employment opportunities, create a push factor for individuals seeking better prospects abroad. Additionally, the region's proximity to Europe makes it a transit point for those aiming to start a new life in the European Union. It is also worth mentioning that the effects of climate change will also compound the existing conflict-driven reasons that lead individuals to flee their home regions or countries, whether this be forced by droughts, rising sea levels, food insecurity as a result of crop failure or desertification. The International Federation of Red Cross and Red Crescent Societies (IFRC) has estimated that there are around 40 million migrants and 14 million displaced persons in MENA. Irregular and illegal migration in the MENA region presents complex challenges with far-reaching consequences, especially for businesses.

Irregular migration in MENA has had a catastrophic impact on supply chains in recent years, particularly in industries relying on low-skilled labour. Sudden labour shortages due to abrupt events such as conflict or natural disasters can impact production schedules, leading to delays and increased costs for businesses. Furthermore, the ongoing war in Ukraine has created additional problems by increasing food and fuel prices, while the lingering effects of the COVID-19 pandemic have also fuelled inflation, raising the cost of delivering humanitarian aid to refugees and displaced peoples, exacerbating the situation.

There are significant security concerns for businesses operating across MENA. The influx of irregular migrants often leads to the rise of informal settlements and the potential for social unrest. Businesses may find themselves amid demonstrations, strikes, or civil disturbances, jeopardising the safety of employees and disrupting normal operations. The presence of migrants, most of whom are facing economic hardships, has contributed to an increased crime rate, particularly near border crossings and ports.

Middle East and North Africa

Businesses that operate near migration routes and borders are at risk of theft, vandalism, and other criminal activities. Several clashes at the Türkiye-Greece border with migrants in 2020 have highlighted the associated risks that irregular migration can have on security.

Businesses operating in North Africa must be vigilant against the risks associated with illegal migration. Human trafficking networks, especially prevalent in places like Libya, have long fuelled criminal enterprises, frequently transporting migrants across the Mediterranean to countries like Greece and Italy using unsuitable boats while extorting high payments. Additionally, migratory patterns in the MENA region provide opportunities for terrorist groups to exploit the situation. The heightened threat of terrorism in MENA, exacerbated by conflicts such as the one in Gaza, is only further fuelled by the profitability of human trafficking enterprises. We therefore assess, that the expanding reach of terrorism across parts of the region will only enhance criminal enterprise, as terror and criminal organisations in the region continue to utilise migratory flows as a source of income.

Businesses in MENA can also face legal and regulatory risks related to employing irregular migrants. Violations of immigration laws and hiring undocumented workers can result in fines, legal proceedings, and damage to a company's reputation. Many migrants have been known to pay

for fake documents in an attempt to cross borders and gain employment. However, managed irregular migration from across MENA to Gulf Cooperation Council (GCC) countries has shown to be very lucrative if managed properly.

Billions of USD have been generated in remittances for migrant workers and their families. Unskilled labour shortages in GCC countries make the region very popular for those fleeing conflict in Iraq, Syria, and Yemen. Nonetheless, it should be noted that GCC members frequently face criticism over poor working conditions and substantial occupational safety and health deficits. This is particularly an issue in migrant-intensive sectors such as construction and domestic work. The Kafala System in GCC countries gives private systems and businesses almost total control over migrant workers' employment and immigration status.

With escalating conflicts, the growing burden of climate change, and the bleak global economic outlook, we expect to continue to witness an expansion of migratory flows across the MENA region. These push factors are set to persist, despite increases in European deterrence measures. As the underlying socio-economic factors remain fragile migratory flows will continue to fuel criminal and terror groups across the region, exacerbating national security risks and the instability from which businesses will be afflicted across the region.





The Americas



The principle transit routes for both legal and illegal migration in the Americas provide a lucrative source of income for local criminal organisations, disrupting supply chains and providing the incentive for violent inter-gang competition. Furthermore, cultural differences between migrants and the native population of their recipient country have been harnessed to generate support for populist governments, which pose a threat to civil liberties, and have the potential to cause regional destabilisation. Thus, illegal migration in the Americas presents a danger to business operations in, and travellers transiting through areas along migration routes and in termination destinations.

The United States remains the principle destination for irregular migration in the Americas. It hosts the highest number of international migrants of any nation in the

world, and more than the next four highest combined. It is estimated that around 23% of this immigrant population is unauthorised with the majority of all migrants to the US continue to hail from the Americas, particularly Mexico, which constitutes the largest national group.

The numbers of immigrants from El Salvador, Honduras, Colombia, Guatemala, the Dominican Republic, and Venezuela have each increased by at least 200,000 since 2010, with the Venezuelan population experiencing the largest percentage growth of any group in that time, reportedly nearing 200%. Mexicans and Central Americans account for around two thirds of all unauthorised immigration, while almost half of all unauthorised immigrants reside in three states: California, Texas, and New York.



The Americas

These areas thus represent attractive sites for criminal activity involving Kidnap Ransom and Extortion (KRE) crimes committed against vulnerable illegal migrants. Travellers should remain wary of criminal activity in these areas, which may spill over to target non-migrants in opportunistic attacks.

Illegal migration has also become a heavily politicised issue across the Americas. Notably, in the United States perceptions of migration remain a deeply divisive issue which contributed to the political instability that saw the storming of the US Capitol in January 2021. With irregular immigration having only increased since that date, it is expected to continue to remain a deeply divisive political issue and contribute to political instability into the future, especially with the prospect of the upcoming presidential election.

The politicisation of migration poses risks to businesses as it fuels uncertainty and instability in the regulatory environment. Sudden policy changes or restrictive immigration measures may disrupt workforce dynamics, leading to talent shortages and increased operational costs. Additionally, negative public sentiment towards migration can create challenges in international markets, affecting cross-border trade and collaboration for businesses operating on a transnational scale.

While a significant body of research suggests that illegal migrants themselves are not actively responsible for any rise in crime rates in the areas they inhabit, it is widely documented that they are at greater risk, both in transit and once they reach their destination, of becoming victims to KRE crimes. The vulnerability of illegal migrants, who find themselves in an unfamiliar environment and unable to interact with the traditional security apparatus of the state, may be said to encourage their targeting for KRE crimes.

Migrant workers, including both legal and illegal migrants, are three times more likely to be forced into exploitative labour practices in the private sector and are particularly at risk of trafficking during their migratory journey. Smuggling of both contraband and people is, therefore, encouraged in areas of heightened illegal migration, as desperate migrants make willing mules and vulnerable targets for abduction and enslavement.

The vulnerability of illegal migrants has been exploited by criminal actors in other migration end destinations and transit routes throughout the Americas. In the last two years, the ongoing economic crisis in Venezuela has been compounded by the COVID pandemic such that significantly higher numbers of migrants have been seen attempting to cross the un-policed Darien Gap between South and North America. This has led to an explosion of the human trafficking industry, with the involvement of one principle criminal organisation on the Colombian side and many smaller gangs on the Panamanian side.

The lack of any hegemonic criminal system in Panama has increased the prospects of inter-gang violence, similar to that seen in Mexico's cartel conflicts, which have also been linked with human traffickers on the US and Guatemalan borders. These conflicts generate substantial personal safety risks for citizens in the region, who may become collateral victims.

Furthermore, the income from the trafficking of migrants provides organised criminal gangs with the power to corrupt political and security officials, leading to further instability and risk to business operations. Most recently, Costa Rica has seen increased activity by organised gangs engaged in criminal operations, partially funded by the transit of illegal migrants. Areas majorly afflicted by this instability are not conducive to business travel or development.

Asia-Pacific



Throughout the Asia-Pacific region, irregular migration arises from a variety of factors, such as conflict, instability, climate change, environmental degradation, and forced displacement. Simultaneously, the pervasive issue of modern-day slavery in the region fuels irregular migration, with individuals exploited in the manufacturing, construction, and hospitality sectors. As the impacts across the region from conflicts, climate change, and other contributing factors look set to persist, understanding the risks from irregular migratory flows becomes crucial for businesses in 2024. A defining feature of irregular migration in the Asia-Pacific region is the prevalence of conflict, exemplified by the ongoing crisis in Myanmar. Since the conflict's onset in 2021, a significant number of individuals have been displaced. Thailand, a neighbouring country, has received approximately 45,000 refugees from Myanmar, while Malaysia has witnessed an influx of up to 160,000 individuals. Moreover, India's Uttar Pradesh state has seen thousands of Rohingya refugees flee from the war in Myanmar. Whereas, reports reveal that over 700,000 Rohingya have fled to Bangladesh with the majority living in the Cox Bazar region, home to the world's largest refugee camp. As a result, Bangladesh has seen rising instances of arson, gang violence, drug trafficking, and abductions within such overcrowded and poverty-ridden camps, which could spill further into the country as authorities struggle to maintain such large numbers of refugees. Within this conflict environment, we have also witnessed an increased presence of smugglers, capitalising on corrupt elements within Myanmar's government allowing the facilitation of human trafficking, and exacerbating migratory flows. In the Asia-Pacific region, ongoing conflicts are poised to sustain irregular migratory flows for the foreseeable future. The persistence of both large-scale and localised tensions is expected to be a driving force behind the continuation of irregular migration patterns.

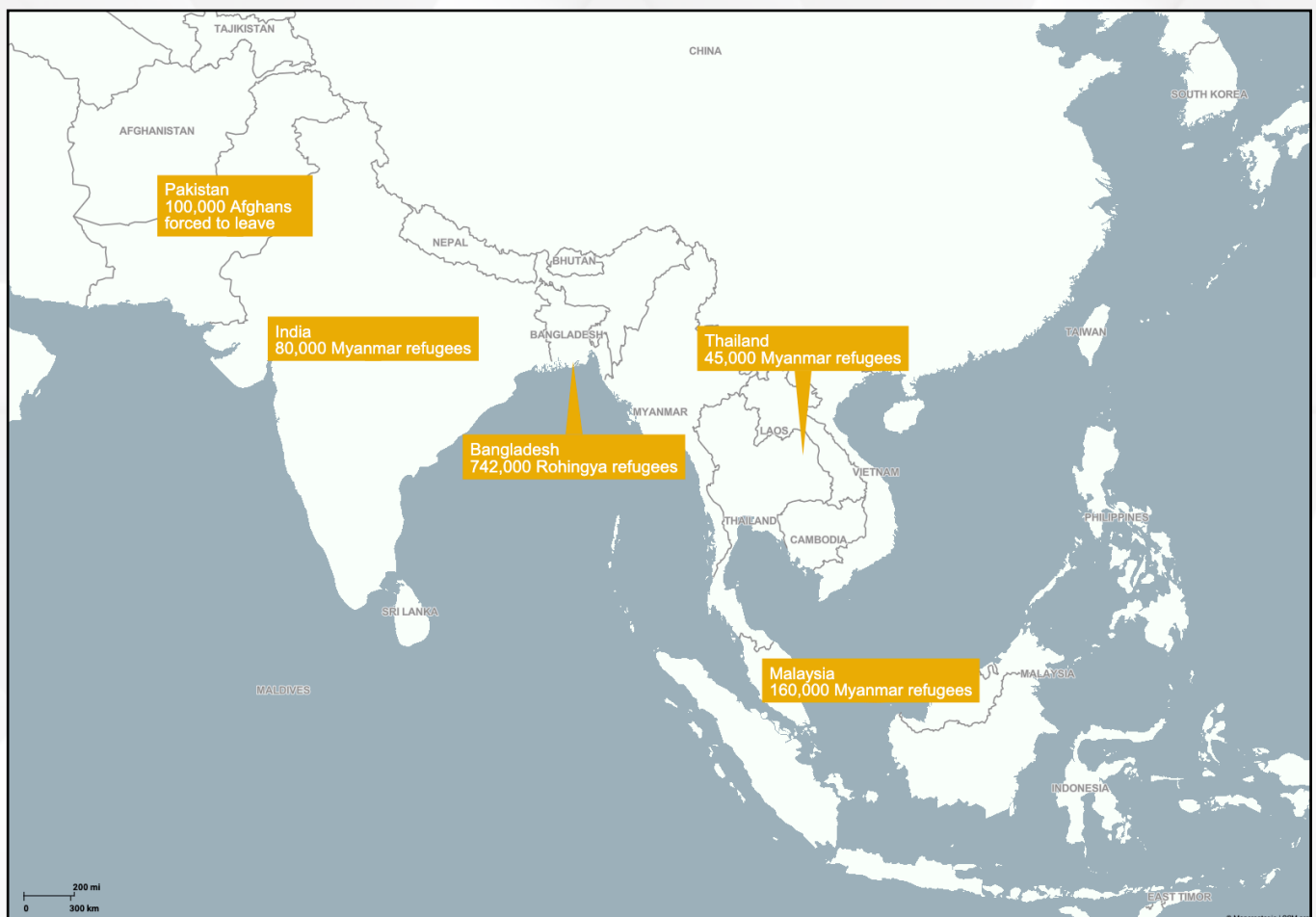
In South Asia, instances of irregular migration persist, notably reflected in Pakistan, where this trend has been accompanied by large-scale deportations. In September 2023, Islamabad issued a stringent ultimatum demanding that unregistered foreign nationals, particularly those from Afghanistan, exit the country. This directive came against the backdrop of Pakistan's assertion that Afghan nationals within its borders are linked to an escalation in terrorist attacks. Amid worsening security conditions under the Taliban's rule in Afghanistan, the prospect of irregular migration is poised to become a pressing concern for neighbouring countries. Fleeing persecution, individuals naturally seek safe havens, prompting a response of heightened border restrictions in Pakistan to mitigate perceived terrorist threats. This stricter stance by Pakistan, however, has drawn condemnation from the Taliban, escalating tensions and introducing an additional layer of complexity to irregular migration in the region.



Asia-Pacific

In the cases of Laos and Cambodia, there remain large unregulated migratory flows to countries like Thailand in pursuit of improved economic prospects. Notably, the Philippines, Indonesia, Vietnam, Myanmar, Cambodia, and Laos function as net-sending countries, while Malaysia, Singapore, Thailand, and Brunei serve as net-receiving countries. The Mixed Migration Centre has claimed that smuggling networks are responsible for facilitating the cause of most of the Laotian and Cambodian migrants who reach Thailand. Despite the economic progress witnessed in many countries within the region, poverty remains a pressing concern, driving individuals to seek better work opportunities either through regulated or unregulated channels. Due to these economic push factors, human trafficking will remain a profitable industry in Southeast Asia consequently funding other criminal enterprises including the smuggling of drugs in society.

In 2024, irregular migration in the Asia-Pacific region will emerge as a substantial concern. Factors such as conflict, persecution, human rights deficiencies, and limited economic opportunities are expected to propel many individuals towards seeking refuge in more stable and prosperous nations. Such flows will continue to fuel criminal enterprise including drug trafficking and modern slavery, which present specific challenges in the region. Businesses continue to face regulatory and reputational risks due to the presence of undocumented workers raising ethical and legal concerns. Such issues are being proactively confronted, such as through the Bali Process which brings together nations and business leaders to address the concerns of human trafficking and modern slavery. With such initiatives likely to facilitate more stringent regulation, compliance risks will be exacerbated.





Europe

Across the continent, Europe has grappled with a surge in irregular migration, sparking heated political discussions in major countries. From the unauthorised boat crossings in the English Channel to the growing number of refugees entering Germany, the phenomenon of irregular migration persists. The motivations behind this trend vary, ranging from pursuing enhanced economic prospects to escaping war and persecution. Anticipating the continuation of these dynamics, Europe is poised to remain a focal point for irregular migration in the foreseeable future.

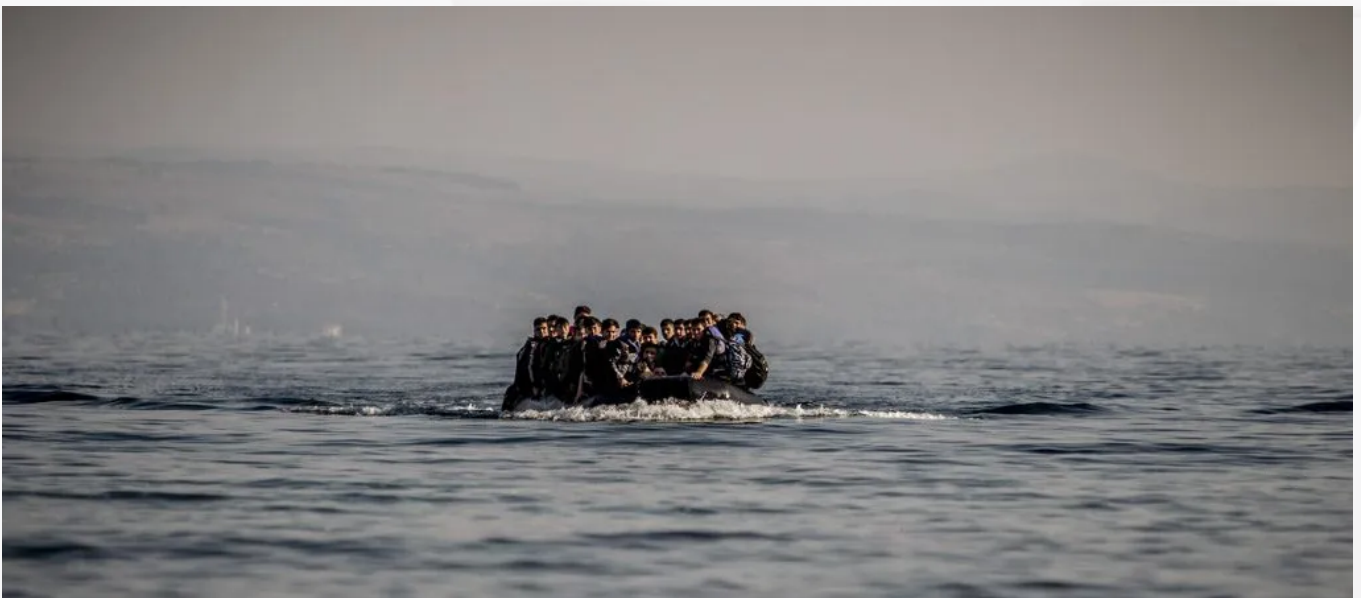
Assessing irregular migration in Europe, it becomes apparent that a substantial number of individuals have migrated to the continent, primarily driven by the destabilisation of their home countries due to conflict. Notably, people from nations such as Afghanistan, Syria, and various African countries have undertaken perilous journeys through the Mediterranean to reach Europe. Italy, in particular, has grappled with unprecedented levels of mass migration, predominantly originating from North Africa. According to the European border agency Frontex, the Mediterranean stands out as the most active route into Europe.

Countries across the continent have felt the repercussions of this irregular migration, as individuals traverse Europe in pursuit of improved economic opportunities. In 2023, Frontex reported a noteworthy increase in irregular border crossings,

surging by 17% in the first 11 months, surpassing 355,000 cases. This figure has already exceeded the total number of illegal crossings recorded in the entire year of 2022. During the EU Leaders Summit in February 2023, 27 countries, including Austria, the Netherlands, Belgium, Ireland, and Denmark, voiced their apprehensions regarding the escalating numbers of irregular arrivals.

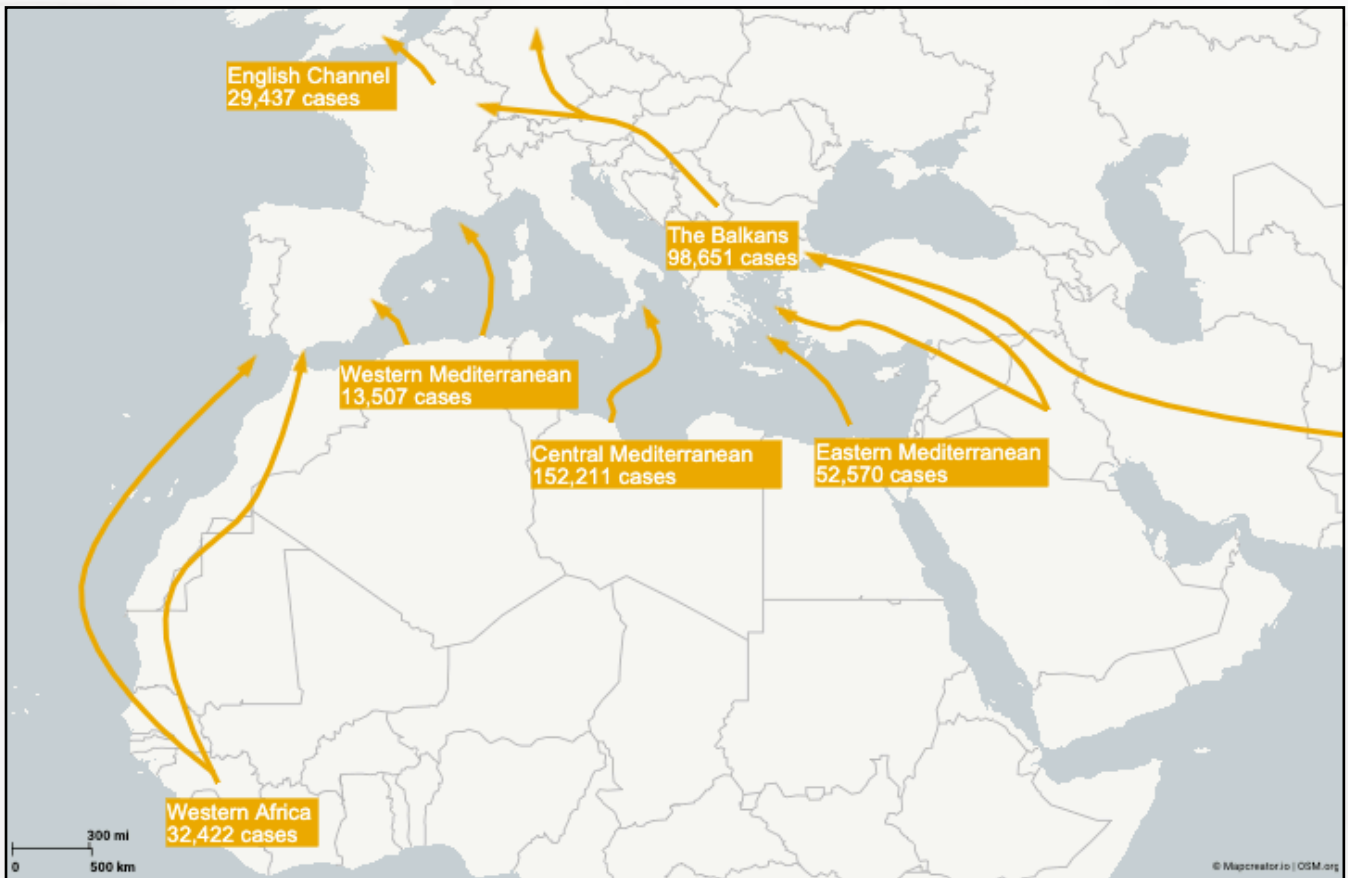
These unauthorised crossings, facilitated by human traffickers pursuing profitable motives, exploit land, sea, and air routes. Notably, sea routes have witnessed a concerning increase in migrant fatalities. The International Organisation for Migration documented 2,500 deaths in the Mediterranean during 2023, underscoring the grim toll associated with irregular migration via sea routes.

Western and Central European nations have experienced a significant influx of migrants, while their counterparts in Eastern and Southern Europe have maintained a more stringent stance on irregular migration. Countries beyond the EU, including the United Kingdom, have faced substantial challenges with irregular migration, particularly in the form of boat crossings across the English Channel, presenting a growing concern.





Europe



Illegal border crossings have become a divisive issue in Europe, sparking concerns in many countries about the influx of unauthorised entries. This has, in turn, influenced political dynamics, leading to the election of populist leaders. In Italy, the rise of Georgia Meloni, in Hungary, the leadership of Viktor Orban, and the recent election of Geert Wilders in the Netherlands are all indicative of a broader sentiment against illegal border crossings, shaping political landscapes across the continent.

Despite the UK's decision to exit the EU in 2016, citing border control as one of the reasons, managing illegal migration flows remains a persistent issue. In response, the UK government has implemented the Rwanda scheme, redirecting migrants to Rwanda for processing, with the ultimate goal of facilitating their return to their country of origin. The risks associated with these flows have been underscored by instances of terror attacks in recent years. Although it is nearly certain that the majority of irregular migrant arrivals have no affiliation with terrorist organisations, there remains a concern that such groups may seek to exploit migration flows into Europe as an opportunity to plan and execute terrorist operations as witnessed in the past.

In conclusion, Europe is anticipated to confront ongoing and significant irregular migration flows during 2024. This presents inherent risks for businesses, given that migrants often seeking improved economic opportunities in Europe, sometimes becoming vulnerable to modern slavery practices. Consequently, businesses must conduct thorough assessments to ensure the legal status of workers, as failure to do so may lead to accusations of benefiting from exploitative labour practices. Navigating these challenges will be crucial for businesses operating in the evolving landscape of irregular migration in Europe. Furthermore, there is a heightened risk of terrorist organisations exploiting these migration routes, posing a significant threat to businesses. The potential targeting of businesses and the overarching involvement of criminal organisations add layers of complexity and security concerns to the already intricate issue of irregular migration. Addressing and mitigating these multifaceted risks becomes imperative for businesses.



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irt@sps-global.com

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