ICMPD
International Centre for
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ICMPD Migration Outlook Eastern Europe and Central Asia 2024

Eight migration issues to look out for in 2024

Origins, key events and priorities for Europe

The 8 things to look out for in 2024

Below is a non-exhaustive list of trends and developments in the Eastern Europe and Central Asia region that will be high on the agenda of decision makers and analysts alike.

1. Protracted large-scale displacement due to Russia's invasion of Ukraine

The refugee crisis triggered by Russia's military aggression against Ukraine stands as the largest in Europe since the end of the Second World War. As of February 2024, nearly one-third of Ukraine's population remains displaced either internally or across borders. According to UNHCR, there are 6.3 million Ukrainian refugees worldwide, with 5.9 million in Europe and almost 4.3 million in EU Member States. In 2024, analysts do not anticipate a decisive breakthrough for either side on the battlefield. Ebbing Western support, a shift in battlefield initiative, and Russia's material advantage does however increase the risk of Ukraine losing additional territory. This suggests that while the overall situation concerning the forced migration of Ukrainians will likely remain unchanged in 2024, in the event of deteriorating conditions in Ukraine, Europe may see the arrival of several million additional refugees from Ukraine. Looking beyond 2024, it is important to recognise that future migration patterns will not solely be determined by the outcome of the war and the security situation, but also by Ukraine's economic prospects, as well as the success of integration of Ukrainians and their overall well-being in host countries.

2. Decisive debate on the future of temporary protection for Ukrainian beneficiaries in Europe

In response to the continuing war and protracted displacement of millions of Ukrainian citizens, the EU Council extended temporary protection for Ukrainian refugees of war until 4 March 2025, offering a temporary legal status and support, but leaving unanswered the critical question of their eventual return and role in homeland recovery. Recent polls indicate a growing desire among Ukrainian refugees to remain in host countries amid ongoing war, which has reached an apparent stalemate, while the Ukrainian government expresses interest in their return as security conditions permit. However, Ukraine needs to formulate a clear policy for the return of its nationals. As temporary protection nears its end, debates intensify over the beneficiaries' future status, with considerations of potential integration into labour markets as well as repatriation options. Efforts to establish a unified approach within the EU have begun, aiming to balance EU strategic goals with Ukraine's desire for returns, emphasizing the importance of a dual-intent integration strategy to address demographic and economic implications for both Ukraine and host countries effectively.

3. Precarity of the situation for Russian emigrants in non-EU host states and their attempts to reach the EU

2022 witnessed a historic emigration wave of an estimated one million Russian citizens. Most Russian emigrants who departed in 2022 have not returned home, opting for extended stays abroad instead. Türkiye, Serbia, Armenia, Georgia, Kazakhstan, and Kyrgyzstan continue to host significant Russian émigré communities, although their numbers have been on decline. Many Russians view countries in the Caucasus and Central Asia as transit points, with hopes of eventually relocating to the European Union, North America, or elsewhere, if returning home is not feasible in the near to medium-term future. In 2022, the flow of Russians to the EU, measured by the number of first-time permits issued, saw a 35% increase compared to 2021. The number of first-time asylum applications also rose, both in 2022 and 2023. Looking ahead to 2024, similar trends are expected, with a growing number of Russians from the 2022 wave seeking departure from non-EU countries, particularly Georgia, in anticipation of the upcoming Parliamentary elections in autumn 2024, but also Armenia, Kazakhstan, and Kyrgyzstan. More Russians from the 2022 emigration cohort are thus expected to endeavour to reach the EU, where roughly one-third of Russian asylum applicants received one or another form of international protection in 2023, while significant returns to Russia are unlikely until the end of the war.

4. Russia’s quest for labour force beyond Central Asia

Russia’s labour market has been growing increasingly tight, with unemployment reaching the all-time low of around 3%. Its labour supply has been shrinking for several years due to long-term demographic decline, reduced immigration, mobilisation, and 2022’s surge in emigration. Skills and labour and shortages – estimated at a total of 5 million workers in mid-2023 – are keenly felt in the IT sector, adversely affected by the recent departure of many IT professionals. These shortages are recognised as significant constraints likely to impede Russia's growth performance in the years ahead. Conflated data on 2023 flows also suggests growing potential hesitancy among Central Asian migrants to pursue work opportunities in Russia, but especially confine themselves to longer stays or permanent residency in the country at war. To compensate for a shrinking labour force, Russia’s recruiting agencies voice increasing interest in attracting migrants from India, Bangladesh, or Pakistan, especially to fill low-skilled occupations. In 2024, further attempts from Russia to reach out to non-traditional labour force pools beyond the EECA region can be anticipated.

5. The end of "Republic of Artsakh" and its unknown implications on the decades-old conflict between Armenia and Azerbaijan, further displacement and migration dynamics in the region

As of 1 January 2024, the self-proclaimed "Republic of Artsakh" ceased to exist, following the large-scale military operation of Azerbaijan on 19-20 September 2023 in the part of the region that remained under the control of local ethnic Armenian forces and where Russian peacekeepers had been stationed since November 2020. Following Azerbaijan's September 2023 operation and restoration of its sovereignty in Karabakh, over 100,000 ethnic Armenians left the region for Armenia, with only somewhere between 50 to 1,000 Armenians were reported to remain in the region. Efforts towards normalising relations between Azerbaijan and Armenia are ongoing. Armenia has recognised Azerbaijan's international borders and both countries have recognised each other's territorial integrity. Negotiations, nonetheless, face obstacles due to differing preferences, whereby questions on border delimitation, enclaves, transport links, and the handover of landmine maps remain open. On 7 December 2023, Azerbaijan and Armenia announced plans towards a peace deal, issuing a joint statement. However, uncertainty persists as the early weeks of February 2024 witnessed new instances of border escalation, casting a shadow over prospects for peace. Beyond the progress on the peace deal, 2024 will raise important question regarding the future of 100,000 newly displaced ethnic Armenians: Will they become fully integrated into Armenia's labour market and social life? Will they return to Karabakh? Will they wish to integrate in Azerbaijan and accept Azerbaijan's citizenship? Or will they move to Europe if integration or return prospects are not promising?

6. Central Asia's "immigration dividend", emanating from skilled Russians who entered in 2022, and prospects of stability amidst regional turmoil

In 2022, Central Asian countries experienced increased arrivals of Russian citizens, representing the biggest influx since their independence. Although the flows substantially decreased in 2023, the economies of all five Central Asian countries continue to benefit from Russian migrants and relocated companies, and the growing demand for workers in Russia. The year 2023 was generally a period of stability for Central Asian countries, which managed to avoid major conflicts and saw economic growth, also due to the high remittance flows from Russia. At the intra-regional level, Kyrgyzstan and Tajikistan proceeded with the demarcation of their shared border – a positive development considering the territorial disputes that have previously resulted in the use of force and fatalities.

Strategic global competition in this part of the EECA has intensified, with big players calling for ‘catalysing the potential’ of the *Middle Corridor* (a transit network linking Asia with European markets) and attempting to substitute China’s near monopoly in developing rare earth elements, in abundance in Central Asia, required for many cutting-edge technologies. 2024 is expected to be a comparably stable and secure year for Central Asia, with their economies expected to attain growth rates of 5-6%, further opportunities for closer intra-regional cooperation emerging, and big players finding the region increasingly important.

7. The growing role of the EU as a destination for EECA labour migrants

Amidst the emerging gradual reversal of flows from Russia in favour of other destinations, given the unfavourable security and socioeconomic environment in Russia combined with the strategic steps of origin countries to diversify labour migration destinations and strengthen national economies, the EU has been attracting more EECA labour migrants, including from Central Asia. The overall number of valid work permits held by EECA nationals reached 1.1 million in 2022. Collectively, EECA migrants held a quarter of all valid work permits across the EU, with Ukrainian nationals continuing to represent the largest group among them, notwithstanding a 30% drop in the number of valid employment permits due to activated temporary protection. This suggests an overall trend of growing labour migration from the EECA region to the EU that is highly likely to hold in 2024. Simultaneously, there is a growing number of EECA irregular migrants in EU Member states, in particular citizens of Moldova and Georgia. Unless EECA countries step up their efforts on sustainable returns and reintegration, while EU Member States open additional legal pathways, re-emigration attempts cannot be ruled out in 2024.

8. EU approximation as a key driver for development and reform in Ukraine, Moldova, and Georgia

The year 2023 marked an important milestone for Ukraine, Moldova, and Georgia on the paths towards approximation to the EU, with all three countries receiving EU candidate status. Furthermore, public support for the EU path across these countries has never been as strong as in 2023. The end of 2023 saw the actual entry of Georgia into the first of three stages of accession to the European Union, marked by the approval of the official **candidate** application. Simultaneously, formal membership **negotiations**, representing the second and lengthiest stage of the process, began for Ukraine and Moldova. Past experience shows that the duration and pace of negotiations can vary significantly, and many countries have a long way to go before becoming Member States. Effectively, there can be no reliable predictions made as to when the hope of EU accession for Ukraine, Moldova, and Georgia, upon launch of negotiations, will eventually materialise. The accession of new members may necessitate adjustments on the side of the EU to prevent what is commonly referred to as 'enlargement fatigue' during the pre-accession negotiations. These changes might include a more efficient decision-making process at the EU level, improved institutional consolidation and integration capacities of the EU, and better communication strategies to regain public support and trust. Nevertheless, it is important to remember that the benefits of the EU candidacy extend beyond the prospect of future membership alone. The accession process itself plays a pivotal role in fostering development within the candidate country, strengthening its institutions, and empowering its citizens.

Introduction

The Regional Migration Outlook for Eastern Europe and Central Asia (EECA) presents an analysis of the key events and trends that shaped migration in the EECA region in 2023. Simultaneously, it offers a cautious outlook into areas and issues that may affect migration and mobility to, within and from EECA in 2024. In a non-exhaustive way, the publication addresses developments in the twelve EECA countries (based on ICMPD's regional division) – Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Russia, Tajikistan, Turkmenistan, Ukraine, and Uzbekistan. The analysis is based on ICMPD's regional expertise and desk research from official and public data sources.

In retrospect, the developments for migration in last year's EECA Outlook were correctly anticipated. Since the beginning of Russia's war of aggression against Ukraine, large-scale conflict-induced displacement as well ongoing economic-induced migration, prevalent in the region since the end of the 'Soviet marriage', are the defining features of the EECA region with respect to migration. The war in Ukraine continues to affect the lives of millions of Ukrainians displaced internally and across international borders as well as the populations hosting them, which see their integration as progressively important. Integration debates are fraught with complexity, as they underscore both benefits for hosting states and losses for Ukraine. Additionally, the war's impact has reverberated throughout the region, yielding unexpected economic gains from an influx of Russian emigrants along with their financial and human capital, while also evoking memories of past Russian and Soviet influences. While receiving societies – particularly in Armenia, Georgia, Kyrgyzstan, and Kazakhstan – have responded differently to Russian inflows, most governments have abstained from any major interventions. The longstanding pattern of labour migration, with Russia as a primary destination for regional – more recently Central Asian – migrants, continues to gradually shift as more individuals from the EECA region seek opportunities elsewhere. The EU, on the other hand, is attracting more of the EECA labour force, the war in Ukraine notwithstanding. Potential point of anticipated friction in other regional hotspots have also materialised, exemplified by Azerbaijan's military intervention in the Karabakh region, displacing over 100,000 Armenians who had inhabited the area. At the same time, the political situation in Central Asia remained calm, and even saw signs of regional approximation.

Focus regions

This section delves into the migration-related developments in Ukraine and Russia amid the ongoing war; examines migration realities in Central Asia; and explores the conflict between Armenia and Azerbaijan, which has led to the displacement of over one million people in the last three decades.

Ukraine

Two years on from Russia's invasion of Ukraine in February 2022, a ground war stalemate has seemingly emerged. The refugee crisis triggered by Russia's military aggression stands as the largest in Europe since the end of the Second World War. As of February 2024, nearly one-third of Ukraine's population remains displaced either internally or across borders. According to UNHCR, there are

6.3 million Ukrainian refugees worldwide, with 5.9 million in Europe and almost 4.3 million in EU Member States – although the latter figure may be smaller given that not all Ukrainians revoke their temporary protection status upon leaving the EU. Available figures also confirm return and pendulum migration. In 2023, EU Member States granted temporary protection to some 934,000 additional cases, while the overall number of beneficiaries remained constant, suggesting considerable flows from and to Ukraine, as well as outflows from the EU. An estimated 400,000 persons have returned, albeit to locations where almost half of residences have been damaged or destroyed.

Following a contraction of almost 30% in 2022, Ukraine's economy grew by 3.5% in 2023, attributed to stabilised infrastructure, improved harvest, rerouted exports, government spending, and international donor support. This modest recovery, however, is unlikely to create much economic opportunity for the Ukrainian population and largely relies on continued Western support. In 2024, some 14.6 million people in Ukraine – nearly 40% of its population – may require multi-sectorial humanitarian support.

In reaction to the protracted situation, the EU Council extended temporary protection until 4 March 2025. While this decision creates more favourable conditions for (temporary) integration and economic participation, it gives no answer to the pressing question of whether the millions of Ukrainian refugees can or will return home, when they can do so, and what role they should play in the recovery of their homeland. Recent poll results confirm that increasing numbers of Ukrainian refugees aspire to remain in host countries as the war progresses. Meanwhile, the Ukrainian government is interested in and promotes the return of its citizens as soon as the security situation allows. The State Migration Service of Ukraine even goes as far as requesting that Ukrainian citizens not be classified as refugees and discourages the establishment of integration programs in host countries to encourage return. This notwithstanding, it appears that Ukraine has not formulated a clear policy for the return of forced migrants.

As temporary protection for Ukrainians in the EU and other host countries formally enters its final year in 2024, there will be an intensified debate surrounding the future status of beneficiaries and their integration into economic and labour markets. Presently, varying plans – including those of Switzerland, Norway, Czechia, the Netherlands, and Ireland – considering options for return of Ukrainian refugees are in circulation across Europe. As a counterweight development, negotiations to establish a unified approach have commenced, with the informal meeting of the EU Justice and Home Affairs Ministers on 25 January 2024 serving as a starting point. It is crucial to balance the overall EU strategic approach with the Ukrainian government's desire for return migration. Adopting a dual-intent integration approach across the EU could garner support from both the EU and Ukraine. This is particularly important considering the significant demographic and economic implications for Ukraine and the potential benefits for host countries if managed effectively.

In 2024, analysts do not anticipate a decisive breakthrough for either side on the battlefield, while ebbing Western support, a shift in battlefield initiatives, and Russia's material advantage increase the risk of Ukraine losing additional territory. This suggests that the overall situation concerning the forced migration of Ukrainians will likely remain unchanged in 2024. The ongoing winter of 2023/2024 did however witness more effective air defence of Ukraine and saw a smaller influx of refugees than predicted in 2023. How and to what extent Ukraine's allies continue supporting the country in its defence efforts is decisive. In the event of deteriorating conditions in Ukraine, Europe might see another several million refugees from Ukraine, with predictions going as far as another ten million should Ukraine lose the war. Looking beyond 2024, it is important to recognise that future migration patterns will not solely be determined by the outcome of the war and the security situation, but also by Ukraine's economic prospects, as well as the success of integration of Ukrainians and overall well-being in host countries.

Armenia and Azerbaijan

As of 1 January 2024, the self-proclaimed "Republic of Artsakh" ceased to exist, following the large-scale military operation of Azerbaijan on 19-20 September 2023 in the part of Karabakh that remained under the control of local ethnic Armenian forces and where Russian peacekeepers had been stationed since November 2020. Since 1988, the fighting over this land – a legacy of Soviet rule – has caused the displacement of over a million people and the loss of life of thousands on both sides. Following Azerbaijan's September 2023 operation and restoration of its sovereignty in Karabakh, over 100,000 ethnic Armenians left the region for Armenia. The Government of Armenia, with the support of international partners such as UNHCR, the Red Cross, the EU, and USAID took immediate action to register newly displaced, refer them to temporary accommodation sites, and provide material and financial aid. On 26 October 2023, Armenia adopted a decree on granting temporary protection to displaced people from the region, initiating the issuing of refugee IDs. The displaced population settled unevenly across Armenia, with many congregating in Yerevan. For Armenians who remained in Karabakh, a reintegration plan into Azerbaijani society under the jurisdiction of Azerbaijan was offered, with the government guaranteeing the right to preserve their culture, language, and religion and ensuring access to its social system. In October 2023, the Azerbaijani authorities announced they had received 98 applications through the earlier-created reintegration porta. According to a UN source, as few as 50 to 1,000 ethnic Armenians are reported to remain in the Karabakh region. Azerbaijan also initiated a program for the return of internally displaced persons who fled Karabakh for other parts of Azerbaijan over the past 30 years, aiming to resettle around 140,000 IDPs by 2026, while 5,400 former IDPs have already been resettled by early 2024. The programme envisages the reconstruction of parts of the Karabakh and East Zangazur regions, intended for resettlement, including the construction of housing.

Efforts towards normalising relations between Azerbaijan and Armenia are ongoing. The two countries recognised each other's territorial integrity and Armenia recognised Azerbaijan's international borders. Negotiations, nonetheless, face obstacles due to differing preferences, whereby questions on border delimitation, enclaves, transport links, and the handover of landmine maps remain open. On 13 November 2023, EU Foreign Ministers approved a proposal to expand the operations and increase the staff of the EU Mission in Armenia within the scope of the initial two-year mandate, with the intention to continue routine patrolling and contribute to mediation efforts in the region. On 7 December 2023, Azerbaijan and Armenia announced plans towards a peace deal, issuing a joint statement, one of the first to not be mediated by a third party. On 13 December, both sides exchanged prisoners of war as a gesture of goodwill. In addition, Armenia withdrew its candidacy to host the next United Nations Climate Change Conference (COP29), and Azerbaijan supported Armenia's inclusion in COP's Eastern European States grouping. Meetings were held to discuss border delimitation – the last such meeting convened on 31 January 2024 – with the process set to unfold after the conclusion of a peace treaty. It is key that considerations for a peaceful future in this part of the Caucasus find greater support in both Armenia and Azerbaijan, as well as among various international partners. However, uncertainty persists as the early weeks of February 2024 witnessed new instances of border escalation, casting a shadow over prospects for peace.

Russia

The emigration wave that Russia faced in 2022 marked a historic development for the country. Within only a year, up to an estimated one million Russians (the dynamic nature of migrant movements complicates precise estimates) could have left the country, following the invasion of Ukraine and the partial mobilisation announced in September 2022. In 2023, Russia's government abstained from widely unpopular measures including another mobilisation, which could have fuelled another outflow. Russia's economy has proved resilient, despite facing over 16,000 sanctions. Russian trade has been redirected to the East, particularly China, but also (albeit less in volume) to Türkiye, Commonwealth of Independent States (CIS) countries, and India. Substantial government spending – on national defence and social payouts – along with high private consumption allowed Russia to gain at least 3% in real GDP in 2023, according to the revised IMF Outlook of January 2024. However, Russia is facing high inflation, which likely exceeded the 7% mark in 2023. Furthermore, the labour market in the country has been growing increasingly tight with unemployment reaching the all-time low of around 3%. The labour supply has been shrinking for several years due to a long-term demographic decline (the labour force pool of those born in the 1990s is particularly small), lower immigration and the surge in emigration recorded in 2022. Shortages of labour and skills – in total estimated at 5 million workers in mid-2023 – are keenly felt in the IT sector, adversely affected by the recent departure of many IT professionals. These shortages in labour and skills are commonly recognised as significant constraints likely to impede Russia's growth performance in the years ahead.

Russia's international migration data for January-November 2023 reveals an outflow of just over 400,000 individuals, including Russian citizens and longer-term foreigners, down from 623,000 in the same period in 2022 (668,000 for the full year). For the second consecutive year, net migration has remained positive largely due to favourable migration trends with Tajikistan (in 2022, net migration hit a historic low of 35,000). However, the inflow of migrants continues to be lower than in the past five years. As outlined in the Trends section below, labour migration to Russia appears to be slowing down, and fewer migrants opt to settle permanently in the country. Employers are struggling to find an adequate labour force, resorting to various measures. As of 1 January 2023, over 132,000 convicts were employed in institutions in roles related to income-generating activities and major businesses, such as the Russian equivalent of Amazon, extensively utilised prison labour. Since 1 October 2023, individuals sentenced to forced labour have been permitted to work for independent entrepreneurs. Additionally, there is a growing demand for workers of retirement age, and, to some extent, individuals with disabilities, as well as initiatives for students to work and study simultaneously.

Most Russian emigrants who departed in 2022 have not returned home, opting instead for extended stays abroad. Türkiye, Serbia, Armenia, Georgia, Kazakhstan, and Kyrgyzstan continue to host significant Russian émigré communities. While decreasing in all cases, rough estimates of these communities total 60,000 in Kyrgyzstan, some 100,000 in both Georgia and Türkiye each, and up to 200,000-300,000 in Armenia, Kazakhstan, and Serbia each respectively. Many Russians view countries in the Caucasus and Central Asia as transit points, with hopes of eventually relocating to the European Union, North America, or elsewhere, if returning home is not feasible in the near to medium-term future. In 2022, the flow of Russians to the EU, measured by the number of first-time permits issued, surpassed 112,000 – marking a 35% increase compared to 2021 – with Germany, Cyprus, Spain, and Poland being the primary destinations. The number of first-time asylum applications also rose, reaching 13,500 in 2022 and exceeding 17,000 in 2023 (data for 13 EU Member States only), with approximately half filed in Germany and France. There has also been an increase in illegal presence and entry refusals, albeit figures remain consistent with pre-pandemic levels.

In 2024, the observed trends will most likely hold. A growing number of Russians from the 2022 emigration wave are likely to seek departure from the non-EU countries mentioned, particularly Georgia, in anticipation of the upcoming Parliamentary elections in autumn 2024. The victory of either pro-European or pro-Russian parties offers little hope for diminishing the tension felt by pro-European Georgian society towards Russian immigrants. Significant uncertainly remains also in other non-EU destinations. After developments in Karabakh, Armenia is searching for greater engagement with Western countries, much to the dislike of Russia, and remains challenged by the cost of absorbing the newly displaced population. Kazakhstan has already enacted a new law discouraging longer visa-free stays for Russians (read in the section Central Asia) and remains wary of their influence as it builds own national history. Moreover, there are risks that Kyrgyz and Kazakh authorities return to Russia any Russians protesting the war, where they would face potential imprisonment and even torture. Concurrently, more Russians from the 2022 emigration cohort are expected to endeavour to reach the EU or the US, while significant returns to Russia are unlikely until the end of the war.

Central Asia

Migration in Central Asia remains affected by pre-existing drivers, foremost by economic vulnerabilities, underemployment of growing and predominantly young populations, intra-regional conflicts, and climate change.

Outward labour migration and remittances provide a much-needed lifeline to certain Central Asian populations. In 2023, much like in preceding years, Russia remained an important labour market for Central Asian migrants, given the expected acute labour force shortages in Russia and socioeconomic pressures in home countries. This is particularly true for migrants from Tajikistan who have few real alternatives but the Russian labour market. Despite some uncertainty stemming from Russia's war against Ukraine, migration to Russia – the main market for migrant workers from Uzbekistan, Tajikistan, and Kyrgyzstan – picked up in 2023, with the number of Uzbek, Kyrgyz, and Tajik nationals citing work as their purpose of entry to Russia increasing by 37%, 27%, and 21% respectively, compared to 2022. At the same time, the number of valid patents (work permits) issued to Uzbek and Tajik nationals (Kyrgyz nationals are subject to a different procedure as Kyrgyzstan is a member to the Eurasian Economic Union) increased by a marginal 3% year-on-year and did not exceed the 2.1 million mark recorded in 2021. This may indicate potential hesitancy among Central Asian migrants to pursue work opportunities in Russia, indirectly confirmed by the acute shortages in the Russian labour market, which requires due monitoring in 2024.

Overall, **Central Asian labour migrants remain susceptible to the impact of the war in Ukraine**, be it through declining remittances or new Russian laws, which grant fast-track procedure to citizenship but at a cost. In recent years, hundreds of thousands of Central Asian citizens received Russian citizenship, which allows Russia to mobilise them for war or hold them criminally liable for draft evasion and strip them of citizenship (read more in the section Russia's migration policy post-2022). Russia's economy, which has thus far withstood tough international sanctions, may also start slowing. This will pose serious economic challenges to countries such as Tajikistan and Kyrgyzstan, where remittances constituted 50.9% and 27.9% of GDP respectively in 2022. Migrants for whom economic considerations are particularly important may vote with their feet and look for alternative destinations, since returning home where jobs are scarce is not a viable option.

In 2022, **Kyrgyzstan, Tajikistan, Uzbekistan, and Kazakhstan experienced increased arrivals of Russian citizens**, representing the biggest influx since their independence. The estimates range from 64,000 in Kyrgyzstan, up to 300,000 in Kazakhstan, or even more than 400,000 in Uzbekistan. The flows, however, substantially decreased in 2023, foremost because of the absence of another mobilisation as well as Russia passing laws limiting the exit of citizens subject to potential mobilisation, including through the seizure of travel documents. In addition, **Kazakhstan** put an end to the practice of extending the visa-free period by crossing the border and returning back. Since January 2023, Russian citizens need to apply for a residence permit and formalise their stay in the country after the visa-free period of 90 days. Many Russian migrants stayed in Central Asia only temporarily before moving on to other countries, with some returning to Russia. Despite this, experts estimate that the economies of all five Central Asian countries continue to profit from Russian migrants and relocated companies, and the growing demand for workers in Russia. Economic growth is forecasted in all countries, particularly **Tajikistan**, which may see its economy grow by as much as 7.5% in both 2023 and 2024.

The **situation in Afghanistan**, following the Taliban takeover in August 2021, continues to reverberate across Central Asia. Relations between Central Asian countries and Taliban-led Afghanistan continue to cause concern, and not just for security reasons. Due to Afghanistan's intention to establish a new irrigation scheme, Turkmenistan and Uzbekistan risk losing up to 15% of the water from the Amu Darya River. As a result, the Presidents of Tajikistan, Turkmenistan, and Uzbekistan declared that, if necessary, they would join anti-Taliban forces. The Afghan refugee population is one of the world's largest, with most displaced within the region, in particular Pakistan and Iran. With economic and human rights situations continuing to deteriorate in 2023, the Pakistani and Iranian governments' decision to repatriate Afghani migrants illegally residing on their territories is a cause for concern among the region's neighbours. Moreover, the sudden return of hundreds of thousands of Afghans to their home country, particularly before and during winter, is expected to exacerbate Afghanistan's already dire humanitarian crisis. This can encourage secondary movements of displaced people to Central Asia.

Despite these upheavals, 2023 was generally seen by experts as a year of stability for Central Asian countries, which managed to avoid major conflict and saw economic growth. At the intra-regional level, Kyrgyzstan and Tajikistan proceeded with the demarcation of their shared border – a positive development considering the territorial disputes that have previously resulted in the use of force and subsequent fatalities. Despite growing disagreement with the Taliban and remaining risks from the South, 2024 is expected to be a comparably stable and secure year for Central Asia.

Migration trends in the region

This section covers key migration trends observed in the EECA region in 2023, focusing on the structural drivers and adjustment of the EECA economies to the shocks of 2022; labour mobility patters; as well as displacement and irregular migration dynamics, all of which continue to be affected by Russian aggression in Ukraine and related political and economic developments in the region. The security, political, and economic situation in Eastern Europe and Central Asia remains volatile, making forecasts uncertain.

Economic performance across the region: GDP growth, inflation, and remittances

After a turbulent 2022 marked by significant highs and lows in real GDP growth, peaks in inflation due to spillovers from Russia's invasion of Ukraine, the impact of global economic fragmentation, and the lingering effects of the COVID-19 pandemic, **EECA economies have shown signs of adaptation in 2023**.

For the second consecutive year, **Armenia, Georgia, and Tajikistan** emerged as the top three growth performers in the EECA due to ongoing (in)flows of investment and people. All three countries continued receiving high volumes of remittances from Russia. The share of remittances in the GDP of **Tajikistan** amounted to a staggering 51% in 2022 and exceeded 48% in 2023. In **Armenia and Georgia**, remittances' inflow declined compared to 2022 but remained well above the pre-invasion and pre-pandemic levels, contributing to GDP growth in 2023. Gains in the tourist sector, particularly from visitors from Russia, also bolstered economic growth. Inflation that climaxed at 12% in Georgia and at 8% in Armenia in 2022 reached an average 2.5% in the former and fell to zero in the latter in 2023, corresponding to the two best results in the EECA region. Despite positive economic indicators, observers note that the effects of Russian 'hands, brains and monies' are time-bound and do not translate into tangible benefits for the populations of Georgia and Armenia, where housing prices have soared and emigration aspirations remain high.

Table 1. Real GDP (percent change) and Inflation rates (percent change)

Annual GDP Estimates and Forecasts						Inflation	
	2021	2022	2023e	2024f	2025f	2022	2023
Armenia	5.8	12.6	**7.1**	4.7	4.5	8	0
Azerbaijan	5.6	4.6	1.5	2.4	2.5	13.9	8.8
Belarus	2.4	-4.7	3.0	0.8	0.8	12.8	5.8
Georgia	10.5	10.4	**6.5**	4.8	4.5	12	2.5
Kazakhstan	4.3	3.2	4.5	4.3	4.5	20.3	9.8
Kyrgyz Republic	5.5	6.3	3.5	4.0	4.0	14.7	7.3
Moldova	13.9	-5.0	1.8	4.2	4.1	30.2	4.2
Russia	5.6	-2.1	2.6	1.3	0.9	11.9	7.4
Tajikistan	9.4	8.0	**7.5**	5.5	4.5	4.2	3.8
Ukraine	3.4	-29.1	4.8	3.2	6.5	22.6	5.1
Uzbekistan	7.4	5.7	5.5	5.5	5.5	12.25	8.8

Source: World Bank, Global Economic Prospects January 2024; Inflation rates based on data from national banks or statistical offices of EECA countries

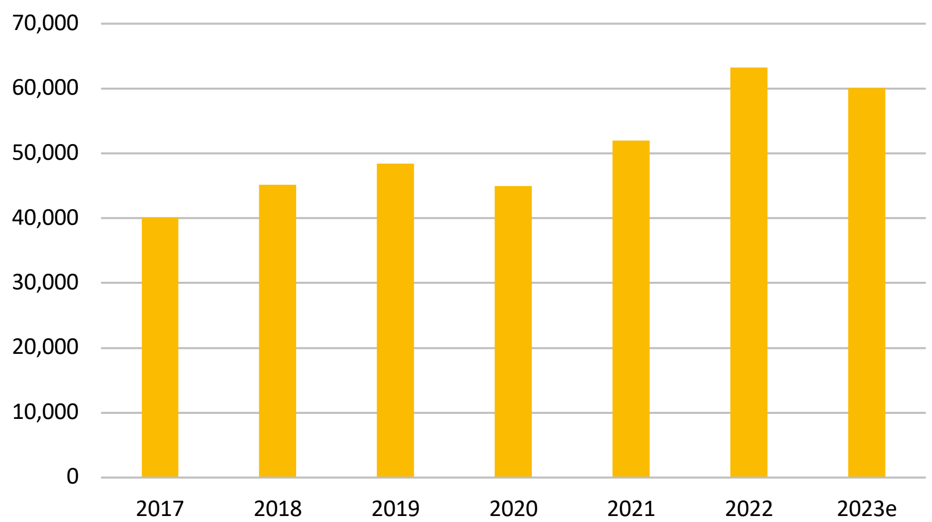
Like Tajikistan, the remittance-intensive economies of **Kyrgyzstan and Uzbekistan** rely on the money transfers of their labour migrants. In 2023, remittances comprised 20.5% of the GDP in Kyrgyzstan and 17.8% of the GDP of Uzbekistan, the EECA's largest recipient of remittances in absolute terms. The depreciation of the Russian rouble, which dragged down the respective value of remittances, and weaker performance in the gold and agricultural sectors – presumably, also lower capital inflows from *new* Russian emigrants – saw the GDP of Kyrgyzstan decline year-on-year. Uzbekistan's economy, on the other hand, showed resilience, performing nearly as well as in 2022 and managing to lower inflation by 3.5% by the end of 2023. Uzbekistan has carried out a set of important structural reforms impacting the economic sphere in recent years, with the latest being the adoption of the Uzbekistan-2030 Development Strategy.

The economies of **Belarus and Moldova** showed a modest recovery in 2023. The growth in **Belarus** following a sharp contraction in 2022 signifies the deepening of trade and investment links with Russia, making the country more vulnerable to the negative economic performance of its neighbour. The economy of **Moldova** suffered greatly because of the invasion of Ukraine in 2022 and remains dependent on the recovery in, and remittances from, the euro area.

After two strong years, **Azerbaijan**'s GDP decelerated reaching 1.1%, according to the country's Central Bank, attributed to lower prices on hydrocarbons, and slowing remittances from Russia. Nevertheless, the country managed to halt inflation, which peaked at 13.9% in 2022 declining to 8.8% by the end of 2023.

Kazakhstan's economy showed ample resilience in 2023, in part due to increased oil production (e.g. Tengiz oil field expansion) and strong foreign direct investment (FDI) inflows into this sector, but no less due to increased government spending. The country also continued benefitting from financial assets brought by Russian emigrants, particularly those who registered new businesses in Kazakhstan. At the same time, personal remittances from Russia to the country declined drastically by 40% (Q3 2022 vs Q3 2023), whereas reverse flows increased by 60% in the same period. Unlike most EECA countries, the remittances share of Kazakhstan's GDP is minuscule, amounting to a mere 0.2%.

Figure 1. Migrant remittance inflows to the EECA region (US$ million)



Source: World Bank

An **observed change in trade patterns among the countries of Central Asia and the South Caucasus** is worth highlighting. While Armenia and Kyrgyzstan increased their exports to Russia two to three times over, other countries of the region, by contrast, stepped up their exports to the rest of the world, including the EU, the US, and China. This diversification of trade is seen as a positive development contributing to the stability of economies, yet, the growing role of China, which is entering recession, creates new risks of co-dependency. Seemingly, strategic global competition in this part of the EECA is intensified with big players calling for 'catalysing the potential' of the *Middle Corridor* – a transit network linking Asia with European markets by way of Central Asia, the Caspian Sea, and the Caucasus – or making strides to substitute China's near monopoly in developing the rare earth elements, in abundance in Central Asia, required for many cutting-edge technologies.

According to various forecasts, **the economic outlook for the region continues to be influenced by external factors**, including a potential slowdown in China, the ongoing conflict in the Middle East, the prospect of heightened tensions across EECA, a potential resurgence in energy prices, numerous upcoming presidential, parliamentary, and local elections, and notably, the uncertainty surrounding Russia's invasion of Ukraine, which represents a major risk for the EECA region.

In 2024, it is anticipated that growth in the South Caucasus will moderate at 3.3%, while Central Asian economies could attain growth rates of 5–6%. The impact of sanctions on Russia, leading to the implementation of capital controls to address the rouble's depreciation at the end of 2023, may have repercussions on remittances to Tajikistan, Kyrgyzstan, Uzbekistan, Armenia, Azerbaijan, and Georgia. The EU's weaker-than-expected growth may adversely affect Moldova, which would need to soon commence economic reforms as an EU candidate country. For Armenia, the economic outlook should factor in increased spending to ensure the well-being of newly displaced ethnic Armenians who fled in the autumn of 2023. Meanwhile, Russia and Ukraine continue facing inflated risks due to the war, which is unlikely to end in 2024.

Forced displacement and international protection

Russian aggression against **Ukraine** caused the unprecedented displacement of the Ukrainian population within and outside Ukraine's international borders. More than 5.9 million Ukrainians have registered for temporary protection (or similar national protection schemes) in Europe. This status provided them with immediate access to protection, job markets, and specific support measures in the areas of education, accommodation, and health services. Within the EU, Poland and Germany host the majority of displaced Ukrainians (1,640,510 and 1,028,940 persons respectively). According to UNHCR, more than 1.2 million people from Ukraine were registered in Russia, although the latest available data record is from June 2023. Compared to 2021, the number of asylum applications in 2022 and 2023 increased for all EECA nationalities, except for Moldova (see Table 2). The majority of EECA nationals seek asylum in the EU or the US. Within the EU, Germany is by far the most popular destination among EECA asylum seekers, followed by France, Sweden, and Poland. The biggest increase, however, is registered for asylum applicants from Georgia and Russia.

Table 2. UNHCR data on asylum applications submitted by the citizens of EECA countries globally, except Ukraine

Country	2019	2020	2021	2022	First 6 months of 2023
Armenia	6,766	4,201	5,573	11,096	6,960
Azerbaijan	4,610	2,484	2,591	4,687	2,759
Belarus	2,452	2,042	4,674	7,859	4,612
Georgia	29,441	12,501	20,154	42,424	27,339
Kazakhstan	4,833	2,582	1,455	5,120	2,982
Kyrgyzstan	1,495	1,144	904	2,679	2,212
Moldova	6,443	4,939	10,032	10,472	3,964
Russia	27,730	15,925	16,903	42,924	42,099
Tajikistan	1,905	1,219	1,267	3,314	1,898
Turkmenistan	189	177	225	616	533
Uzbekistan	2,980	2,931	2,251	6,759	5,169

Source: UNHCR Refugee Data Finder, accessed on 1 February 2024

EUROSTAT data confirms the increase in asylum applications filed by **Russian nationals in the EU**. While 4,395 Russians applied for asylum in the EU in 2021, three times as many (13,350) asylum applications have been registered in 2022, with 21% lodged in Germany, 14% in France and 14% in Poland. Outside Europe, the US is the most popular destination for Russian asylum seekers. According to UNHCR's refugee data finder, 18,610 Russians applied for asylum in the US in 2022, and 21,987 filed applications within the first six months of 2023. In the EU, Russian applicants are subject to the regular asylum procedure, i.e., each case is decided upon individually, making it difficult to forecast the number of Russian applicants granted protection status in the end. According to the EU Asylum Agency (EUAA), the highest recognition rate for asylum applicants from Russia in the first instance was registered in December 2022, reaching 38% for refugee status. Meanwhile, in 2023 the average recognition rate was about 27%. Considering the 3% recognition rate for subsidiary protection, it is safe to say that about one-third of asylum applicants from Russia receive one or another form of international protection in the EU.

For several years in a row, UNHCR and Eurostat recorded a significant increase in asylum applications from **Georgia**. Compared to 2021, the number of applications in 2022 doubled, growing from 12,440 to 25,940 applications respectively. In 2023, the numbers continued to grow[1]. In 2022, the majority of applications by Georgian citizens were lodged in France (31%), Germany (30%) and Italy (12%). According to the EUAA, Georgia was among the ten top countries of origin for asylum applicants in the EU within the first six months of 2023. However, unlike the case of Russian asylum seekers, the recognition rate for asylum claims submitted by Georgians remains very low, standing at about 2% for subsidiary protection and 2% for refugee status. Considering the low recognition rate, there is a strong need to reinforce both return and reintegration efforts for rejected asylum seekers in Georgia, simultaneously providing additional legal migration pathways to resolve this issue.

Internal displacement remains an every-day reality and ongoing challenge for many EECA countries. Since 2014, conflict-driven displacement has been a challenge for **Ukraine** with over 800,000 internally displaced persons (IDPs) registered in 2021. Experts estimate that 16% of the population, or close to seven million people, were displaced internally within Ukraine due to the Russian aggression in 2022. The majority of the displaced population is female**.** A large number find themselves in a vulnerable situation: a third of IDP households include someone who is chronically ill, and a quarter include persons with disabilities. Nearly a third of all IDPs reported at least one secondary displacement, including those who have been displaced since 2014. As of 25 September 2023, an estimated 3.7 million persons remained internally displaced within Ukraine. More than two-thirds of IDPs (70%) reported having been displaced for one year or longer.

Internal displacement in **Georgia** dates to the events of 1991–1993 and 2008, with some also displaced due to natural disasters. Of nearly 340,000 IDPs, most (308,000) are people affected by the conflict and over 31,000 are affected by natural or manmade disasters. Following Azerbaijan's September 2023 operation and restoration of its sovereignty in Karabakh, over 100,000 ethnic Armenians left the region for Armenia (read more in the section *Armenia and Azerbaijan*).

Displacement resulting from extreme weather, the slow onset effects of climate change and water scarcity is a matter of growing concern in the region, particularly in Central Asia, although climate-related displacement is also on the rise in the South Caucasus. The Fergana valley, the most densely populated area in Central Asia, has a history of conflict and violence. Conflicts over border demarcations have become regular events in recent years, mainly between **Kyrgyzstan and Tajikistan**. Nearly 137,000 people had to be evacuated in **Kyrgyzstan** due to the reoccurring border dispute, aggravated by water distribution system challenges between the Kyrgyz Republic and Tajikistan in September 2022. In addition, considering the environmental damage caused by climate change,

[1] No complete EUROSTAT data for 2023 was available at the time of writing.

historical disputes between farmers over water resources in Kyrgyzstan's northern province of Chui and Uzbekistan's provinces of Namangan and Surkhandarya may trigger potential displacement in the future. Within Central Asia, Tajikistan and Kyrgyzstan have laws and policies on internal displacement, but stronger provisions are needed to address and reduce challenges associated with drought and other adverse effects of climate change in this region. Experts underline that Central Asia avoided major conflicts and did not register significant internal displacements in 2023.

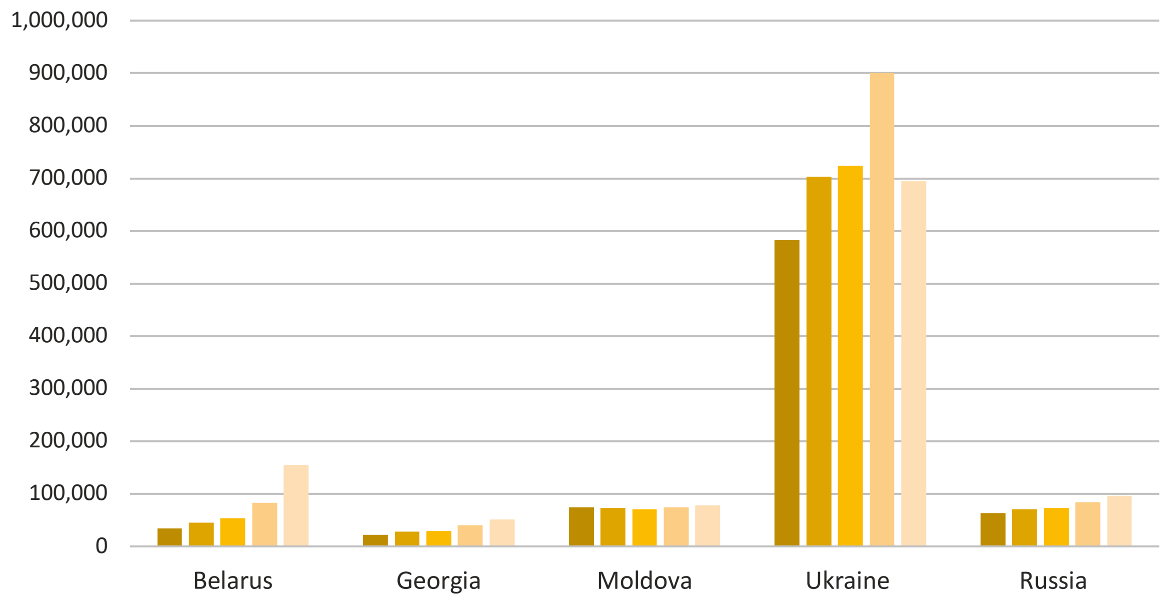
Labour migration from and within the region

For the third consecutive year, we continue to monitor the two key patterns of labour migration in the EECA region: (1) migration from Ukraine, Belarus, Russia, Georgia, and Moldova to the EU, and (2) migration from Central Asian countries to Russia. While traditional drivers of labour migration remain in place, Russia's war in Ukraine and its impact on the EECA region is increasing the role of alternative destinations among migrants who traditionally targeted Russia. Additionally, confronted with pronounced labour shortages, EECA countries are beginning to explore available resources elsewhere.

Labour migration of EECA nationals to the EU

In 2022, labour migration trends from the EECA region to the EU remained largely sustained. Compared to 2021, the overall number of valid work permits held by EECA nationals decreased by approximately 85,000 down to 1.1 million. This decline, however, does not negate **the overall trend of growing labour migration from the EECA region to the EU**. In 2022, EECA citizens collectively held a quarter of all valid work permits across the EU, and Ukrainian nationals continued to represent the largest group among them, notwithstanding a 30% drop in the number of valid employment permits among Ukrainian holders. Given the temporary protection status granting direct access to the EU labour market, Ukrainians received only 270,000 new work permits in 2022, marking the lowest figure since 2015.

Figure 2. All valid residence permits issued for employment in the EU to citizens of selected EECA countries between 2018 and 2022



Source: Eurostat, accessed on 1 February 2024

As in previous years, numbers of Belarusian migrant workers continued to grow, with both flow and stock figures increasing two-fold. The political situation in Belarus following the protests in 2020 and the war in Ukraine may have additionally solidified the trend. Migration flows from Moldova, Georgia, and Azerbaijan increased by 20%, 45%, and 49%, respectively. Flows from Russia increased by 15%, with most new work permits obtained in Cyprus, bringing the total number of valid work permits to nearly 100,000. Russians, together with Ukrainian and Belarusian nationals, made up 83% of the EECA holders of valid work permits in the EU. Over the past three years, Poland remained the most popular destination among EECA labour migrants; an increasing trend. In 2022, the country issued 75% of all first-time work permits to EECA citizens. Despite a relatively small number of valid work permits issued to Central Asian migrants, constituting about 4% of the mentioned 1.1 million, their share showed sustained growth, ranging from 55% to 30%. Moreover, the data on flows equally reflects this trend. Armenian nationals were the least populous group in terms of the share of first-time permits issued to EECA citizens in 2022.

At the end of November 2023, 4.28 million (Ukrainian) beneficiaries of temporary protection registered in the EU, depending on their age, benefitted from direct access to the labour markets. Despite a formally similar starting position, Ukrainian enrolment in paid employment varied across Member

States. 78% of Ukrainian beneficiaries of temporary protection were employed in Denmark, followed by two-thirds of Ukrainians employed in Poland and Czechia, and half – employed in the Netherlands, the UK, and Ireland. Germany, Switzerland, and Austria reported lower employment figures of 17%, 20%, and 27%, respectively. States with lower rates, nonetheless, considered Ukrainian enrolment a success due to faster job placement compared to previous refugee cohorts. Notwithstanding this, in the third year of their residence in the EU, predominantly female Ukrainian refugees have not managed to secure adequate employment corresponding to their high educational qualifications, with many confining themselves to low-paid jobs in hospitality, agriculture, or to temporary positions. Despite a shortage of healthcare professionals, only 7% of Ukrainian refugees, approximately 50,000 trained healthcare workers, were employed in this sector. Efforts to address this issue through targeted measures have shown some promising results but remain limited. As temporary protection for Ukrainians enters its final year in 2024, there is likely to be a reinforced debate on the beneficiaries' future status and economic integration, given that the third year after arrival typically sees a significant rise in the labour market participation of a refugee cohort. As with all other refugee populations, the debate should focus on expanded and more targeted training to leverage the educational attainments and professional backgrounds of Ukrainian refugees, preventing "brain waste" and "brain loss", and ensuring their valuable skills contribute to European labour markets.

Labour migration to Russia and alternative destinations

Labour migration to **Russia**, as in previous years, originates predominantly from Central Asia, particularly Uzbekistan, Tajikistan, and Kyrgyzstan. Nationals of these three countries constituted nearly 90% (close to four million) of all migrants who cited work as their primary reason for entering Russia in 2023, up from 70% in 2019. Cumulatively, 2022 saw over 12 million registrations at the place of residence or stay submitted by labour migrants in Russia. The same dataset for the first half of 2023 shows only 3.5 million such registrations, compared to 5.9 million cases recorded in the first half of 2022. At the same time, the number of new patents (a special type of work permit) and work permits saw a slight increase in the first half of 2023 compared to the corresponding period in 2022, although the total number of valid patents is hovering around two million at the end of each reporting period (year-end or quarter-end), indicating a stable trend. The nature of Russia's migration statistics makes it challenging to ascertain whether there is definitive growth or decline in labour migration flows. As of mid-February 2024, Russia's Ministry of Interior has deleted previously available historic data. Nevertheless, it is likely that **the overall number of migrants in any given moment in 2023 ranged from between three to 3.5 million**, underscoring the pre-existing factors driving migration from Central Asia to Russia. However, recent qualitative research from 2022 and 2023, complementing available data on citizenship and residency permits, affirms declining interest among labour migrants to establish long-term roots in Russia. The aftermath of Russia's invasion of Ukraine emerged as a key factor in this shift, reversing the previously observed dynamics of permanent migration. At present, there are no compelling grounds to anticipate that Russia will lose a significant share of the (temporary) Central Asian labour force overnight, including in 2024. However, the emerging gradual reversal of flows in favour of other destinations is likely to persist, given the unfavourable security and socioeconomic environment (e.g. devaluation of the rouble, thus declining remittances) in Russia combined with the strategic steps of origin countries to diversify labour migration destinations and strengthen national economies.

Over recent years, EECA labour migrants have been actively exploring other destinations. As noted above, flows to the EU continue to grow, also among Central Asian migrants, who have rarely targeted the EU in the past. Based on the data for the first two quarters of 2023, **Kazakhstan** received nearly 318,000 labour migrants from the CIS countries, most of whom arrived from Uzbekistan and Russia, compared to 327,000 CIS migrant workers received in the whole of 2022. Meanwhile, the annual stock of labour migrants accounts for at least 730,000, of whom 86% are Uzbek nationals, as confirmed by IOM's Baseline Mobility Assessments. **Türkiye** is another popular destination for Central Asia workers, as well as nationals of Azerbaijan and, since 2022, also Russians. In early 2024, over 200,000 Turkmen and close to 100,000 Uzbek citizens had various types of permits in Türkiye. The precise number of Central Asian labour migrants in both Kazakhstan and Türkiye is likely higher, as many work informally or in a hybrid form that combines shuffle trade and short-term jobs. Every year, **South Korea** attracts more Central Asian migrants. A few years ago, the country concluded a bilateral agreement with Uzbekistan on attracting a labour force, and more recently with Kyrgyzstan and Tajikistan. With close to 90,000 persons, Uzbek nationals made it to the top-five most populous groups of foreigners residing in Korea at the end of 2023, up from 69,000 registered a year ago. Meanwhile, in early 2024, South Korea announced a call for attracting 100,000 Uzbek migrants for work in the production, agriculture, service, and construction sectors. Regional migrants also flicker to other parts of the world, including to the Gulf region and further afar, however, these flows remain inconsiderable compared to those outlined.

Labour migrants from non-traditional origin countries in the EECA

The lack of labour force motivates EECA countries to explore resources outside of their usual labour force pools. Russia's recruiting agencies increasingly voice their interest in attracting migrants from India, Bangladesh, or Pakistan, especially for low-skilled occupations. In 2022, Bangladesh sent a few hundred workers to a shipbuilding company in Russia for the first time, while at the end of 2023 the Ambassador of Bangladesh indicated that more of Bangladeshi nationals could come to work in Russia in the future. Since 2022, Armenia is negotiating a labour force mobility agreement with India, with the number of Indian migrants in the country estimated at between 20,000 and 60,000 in 2023. Every year, several thousand Indian and Chinese workers come to Kazakhstan under its quota system. Facing acute labour shortages, Moldova has expanded the list of states whose nationals can work in the country without a work permit for up to 90 days. In June 2023, this list was expanded to include EU states, while in January 2024, an additional 20 states, including Armenia, Azerbaijan, Georgia, and Ukraine, became part of this arrangement. Moreover, in 2023, Moldova increased the permitted work hours for foreign students from 10 to 30 hours per week.

Irregular migration and return

In 2021–2022, EECA emerged as the region of transit for non-EECA irregular migrants with Belarus' attempts to push third-country nationals – mostly from Iraq, Afghanistan, and Syria – towards EU borders. As a result, Frontex recorded over 8,000 border detections in 2021 and more than 6,000 in 2022, which significantly exceeded arrivals recorded before 2021. However, this trend completely ceased in 2023, with the number of irregular border crossing attempts from Belarus amounting to as little as 44. The anticipated new attempts of 'state-facilitated smuggling' at the EU-Russia border also did not materialise, with only 148 detections registered in 2023.

Compared to 2021, the number of EECA nationals ***found to be illegally present*** in EU Member States increased by 33% in 2022, with the increase affecting all countries of the region, but most profoundly Georgia, Russia, Armenia, Tajikistan, Turkmenistan, and Uzbekistan with over 50% growth each (see table 3 below). For the third consecutive year, Moldovans, Ukrainians, and Georgians ranked as the top three EECA nationalities most often detected as staying irregularly in the EU. Overall, Germany recorded the majority of apprehensions of illegally present EECA nationals within the EU in 2022. Hungary however apprehended the most Moldovan and Ukrainian nationals; Poland, the most Belarussian nationals; and Lithuania, the most Kyrgyz nationals. It will be imperative to monitor irregular migration flows of Moldovan citizens, in particular to Hungary, in 2024.

Table 3. Citizens of the EECA countries found illegally present in the EU

EECA country	2020	2021	2022	EU MS with most apprehensions in 2022
Armenia	1,305	1,230	2,025	Germany
Azerbaijan	985	760	1,660	Germany
Belarus	1,675	1,650	2,820	Poland
Georgia	10,165	11,480	21,570	Germany
Kazakhstan	945	700	1,240	Germany
Kyrgyzstan	315	350	645	Lithuania
Moldova	24,610	40,870	45,750	Hungary
Russia	5,690	4,410	10,000	Germany
Tajikistan	455	500	1,335	Germany
Turkmenistan	95	70	490	Germany
Ukraine	50,415	36,305	43,220	Hungary
Uzbekistan	845	1,110	2,145	Germany
Total	99,520	101,456	134,922	

Source: Eurostat, accessed on 22 February 2024

Russians, Moldovans, Georgians, and Ukrainians were the top four EECA nationalities ***refused entry*** in 2022. However, compared to 2021, fewer Ukrainians and Moldovans were overall refused entry that year, while the number of Georgian and Russian nationals increased by 45% and 71% respectively. Moreover, the number of EECA nationals not allowed to enter the EU in 2022 constituted 42% of all refusals in 2022.

In terms of returns, Georgians and Moldovans were among the top five third-country nationalities ***returned home following the order to leave*** in 2022–2023, with Georgia topping this list in 2023. Preliminary data for 2023 (still incomplete for the last quarter at the time of writing) highlights the increase of executed returns among Georgian nationals by nearly 50% compared to 2022. The sixth Report of the European Commission on Visa Suspension Mechanism indicates that Georgia cooperated closely with EU Member States on readmission. This is evidenced by Georgia's high rate of positive decisions on readmission requests, reaching 98%. Furthermore, Georgia continues to closely cooperate with EU Member States on returns, including repatriation flights for return purposes and joint FRONTEX trainings on collecting return operations. Compared to 2022, the number of returned Moldovans and Belarussians increased by 45% in the first three quarters of 2023, and the number of returned Russians grew by almost 30%. As predicted, the number of return orders and executed returns pertaining to Ukrainian nationals in 2023 continued to decline.

Similar to previous years, rates of return (ratio of return orders to executed returns) to the EECA region from Europe remain high, on average approaching 60% in 2023. Despite Belarus unilaterally suspending its readmission agreement with the EU in December 2021, the return rate to this country more than doubled in 2023. As was anticipated in the EECA Migration Outlook 2023, indicators of irregular migration – irregular entry, stay, and return orders – for Russian nationals continued to grow in 2022–2023, albeit remaining consistent with pre-pandemic levels. At the same time, fewer Russians were returned following the order to leave than the issued orders in 2023, compared to 2022, with the return rate reaching 38%, the lowest figure since 2015.

Migration policy developments

This section offers an overview of the EU accession progress of Ukraine, Moldova, and Georgia, emphasising the significance of their candidacy status and the commencement of negotiations for the three countries, the EU, and the EECA region. Additionally, we delve into the evolving migration policy landscape of Russia to examine its alignment with the country's broader foreign policy.

EU membership status perspectives for Ukraine, Moldova, and Georgia

The year 2023 marked an important milestone for Ukraine, Moldova, and Georgia on the path towards approximation to the EU, with all three countries receiving EU candidate status. Public support for the EU path within the three countries has grown gradually over the past two decades but has never been as strong as in 2023.

A public opinion survey conducted in April 2023 in Georgia demonstrated that 89% of the population approves of joining the EU, with economic growth and security stated as the primary reasons for approval. In Moldova, a July 2023 public opinion survey confirmed that 63% of the population support EU membership. Meanwhile, 81% of the Ukrainian population (except for the occupied territories) showed a desire to join the EU in September 2023; twice as much as in 2012 (36%) and 20% more than in February 2022. In all three cases, the approval of European integration increased following Russia's invasion of Ukraine, motivating Ukraine, Georgia, and Moldova to submit formal applications for EU membership.

On the EU side, as of June 2023, there were more enlargement advocates than opponents in 24 Member States, with 53% of EU citizens in favour of enlargement (up 1% from winter 2022–2023) and 37% opposing, according to a Standard Eurobarometer survey. This represents a remarkable shift in public opinion, given that the average support for enlargement prior to the 2004 enlargement was 44%.

The end of 2023 saw the actual entry of Georgia into the first of three stages of accession to the European Union, marked by the approval of its official **candidate** application. Simultaneously, formal membership **negotiations**, representing the second and lengthiest stage of the process, began for Ukraine and Moldova. The negotiations take place in intergovernmental conferences between the ministers and ambassadors of the EU governments and the candidate country and relate to the conditions under which the latter could be admitted to the EU. Adoption of the EU Acquis, preparations to properly apply EU legislation, as well as implementation of all necessary judicial, administrative, economic, or other reforms are all part of this process. All of this enables the candidate country to meet the EU accession (Copenhagen) criteria, absorb the body of EU legislation into its national system, and satisfy economic accession criteria. A prospective Member State must have stable administrative and judicial institutions and respect for values such as human dignity, freedom, democracy, equality, and the rule of law as well as respect for human rights, including the protection of minorities. The formal accession process is finalised in the third phase: the signing and ratification of an **Accession Treaty** by all EU Member States.

Experience shows that the duration and pace of negotiations can vary significantly, and many countries have a long way to go before becoming Member States. The negotiations are complex and concern 33 policy chapters[2] grouped into six clusters. Following the *screening phase* – launched in January 2024 for Ukraine and Moldova – the process moves to either opening negotiations under the respective chapters or setting the opening benchmarks to be met first. This in turn shapes the *negotiations*

[2] Chapter 34, *Institutions*, and Chapter 35, *Other issues*, are not a part of neither any cluster nor the screening exercise and will be dealt separately at the later stages of accession negotiations.

positions (opening the clusters) of both the EU and the candidate country, and the *closing of the chapters*. Effectively, there are no reliable predictions, nor can there be, as to when the hope of EU accession for Ukraine, Moldova, and Georgia, upon launch of negotiations, will materialise.

Scheme 1: Key milestones of the approximation of Georgia, Moldova, and Ukraine to the EU

	Partnership & Cooperation Agreement	Visa liberalization	Association Agreement & Deep & Comprehensive Free Trade Area	Application for EU membership	Candidacy	Launch of the accession negotiations	Accession
Moldova	**1998**	**2014**	**2016**	**2022**	**June 2022**	**December 2023**	**?**
Ukraine	**1998**	**2017**	**2017**	**2022**	**June 2022**	**December 2023**	**?**
Georgia	**1999**	**2017**	**2016**	**2022**	**December 2023**	**…**	**?**

The EU candidate status and negotiations for membership process have a direct impact on migration and border management in candidate countries. Migration management, asylum, visa policy, and Schengen legislation are considered as part of the negotiation under Chapter 24: Justice, Freedom, and Security. The successfully completed Visa Liberalisation Dialogues mean that all three countries have adopted a significant part of the EU Acquis in the areas of migration, asylum, and border management. The free movement of persons within the Schengen area – encompassing most EU Member States, except for Bulgaria, Cyprus, Ireland, and Romania, and several Associate members – means that the migration decisions of one Member State affect other Member States. For this reason, the EU established a set of minimum guarantees and standards in relation to the conditions and procedures for non-EU nationals' entry, residence, and work in the EU. Legal acts and procedures in the areas of irregular migration, readmission, and treatment of foreigners must also be harmonised. In addition to border crossing regulations, the Schengen acquis covers cross-border police and judicial cooperation and the Schengen Information System. However, an Accession Treaty does not at the same time extend to an accession to the Schengen area: a substantial part of the Schengen acquis is implemented following a separate Council decision after formal accession. Joining the EU also means aligning national regulations with the Common European Asylum System (CEAS) that requires, among other things, the establishment and maintenance of sufficient reception capacities and conditions, effective integration mechanisms, and qualified personnel dealing with asylum issues.

Ukraine, Moldova, and Georgia have engaged actively in the process of approximation, making significant strides towards alignment with European standards. In 2024, the process will continue unfolding in all three countries in alignment with the expectations of continuing EU approximation on behalf of Moldovan, Ukrainian, and Georgian citizens. Simultaneously, the countries' reform efforts might encounter increased enlargement fatigue on the EU side, characterised by cumbersome decision-making processes, institutional shortcomings limiting integration capacities, or declining public support and trust. Nevertheless, it is important to remember that the benefits of the EU candidacy extend beyond the prospect of future membership alone. The accession process itself plays a pivotal role in fostering development within the candidate country, strengthening its institutions, and empowering its citizens.

Russia's migration policy post-2022

The immigration system in Russia has been described as being of a reactive and volatile nature, as laws affecting both migrants and citizens undergo frequent changes. Seven months into the war with Ukraine and shortly after the September 2022 mobilisation and the second spike in 2022 outflows from Russia, a plan to amend the existing Migration Policy Concept 2019–2025 was announced at a Security Council Meeting in October 2022. The revised concept for the period 2023–2025 was signed off by President Putin on 12 May 2023, while in early 2024 Russia's Cabinet of Ministers approved the accompanying Action Plan for 2024–2025. The concept has significantly shifted its focus towards retaining, attracting, and integrating human capital, recognising heightened emigration trends, and advocating for the establishment of "attractive financial, social and other mechanisms for preserving human capital and reducing the outflow of the population of the Russian Federation abroad". Among the main tasks, the concept stipulates the augmentation of organised labour migration, allowing migrants to alter the purpose of their entry within Russia and calling for improved monitoring of the labour force needs and a unified system containing information about migrants. Beyond labour migration, the concept underlines the need to increase interest in Russian education among foreign youth, including learning the Russian language abroad. Clauses referring to the integration and adaptation of foreigners were complemented by new provisions to facilitate foreigners' proficiency in Russian, promote familiarity with "traditional Russian spiritual and moral" values, and enhance understanding of Russian legal norms. In addition, the concept prohibits any form of discrimination against foreigners – a contentious topic for Russia, especially given a rise in xenophobic anti-migrant rhetoric in parliament, the media, and wider society – while arguing that the popularisation of Russian culture abroad contributes to migrants' adaptation in Russia. Another notable element envisaged by the concept is the return of residents of the territories in eastern Ukraine – the so-called DPR, LPR, as well as Zaporizhzhia and Kherson regions, which Russia claims as its part – who left their homes. However, the Action Plan 2024–2025 foresees no actions to this end nor present a concrete proposal on anti-discrimination.

This revised migration policy concept demonstrates a palpable concern regarding the imperative to draw in individuals to offset labour shortages in Russia amidst enduring demographic challenges, population outflow, and war. Concurrently, there exists a keen interest in both temporary labour migrants and foreigners and expats inclined to establish roots within Russia's borders. On the execution front, as per the Action Plan 2024–2025 – alongside focusing on various integration measures, expanding access to e-visa for more countries, and raising enrolment rates among foreign students and pupils –, the year 2024 shall see over a dozen activities for creating and rolling out digital tools for stocktaking of existing and incoming human capital, as well as allowing stronger societal oversight and control over migrants. By the end of 2024, migrants will have to create a "digital profile", which will allow the Russian government to track the arrivals of those nationals that can enter Russia visa-free, as well as to expand the collection of biometric data of foreigners who arrive at Moscow airports. Meanwhile, by June 2025, Russian consulates should have tools to enforce mandatory consular registration of Russian citizens living abroad. The rollout of various forms of digital IDs and digital wallets is a global trend; however, researchers warn of the associated risks, especially if these solutions are implemented in a way that unifies identity records into one centralised profile, therefore enhancing the tracking and policing of migrants and refugees, as well as citizens.

Besides recent updates to the Migration Policy Concept, Russia has overhauled its citizenship law as an increasingly important vehicle for population management amidst existing socioeconomic and war-related conditions. Presented for revision in late December 2021, the extensively amended 2002 Citizenship Law was signed by President Putin in April 2023 and took effect on 26 October 2023. The revised law facilitates simplified citizenship acquisition for descendants of individuals who were permanent residents of the USSR or Russian Empire. Previously, this pathway was only available to Russian speakers from Belarus, Kazakhstan, Moldova, and Ukraine. Those seeking naturalisation via the regular route must demonstrate knowledge of Russian history and law, in addition to meeting existing requirements such as five years of residency, fluency in Russian, and no hindrances to citizenship (e.g., involvement in violent attempts to overthrow the constitutional order or terrorist activities). Meanwhile, the grounds for citizenship deprivation (acquired through naturalisation or recognition) have expanded and become more specific, including reasons related to security, but also draft evasion and desertion, voluntary surrender to captivity, or failure to obey orders during mobilisation or wartime. Furthermore, the law also expanded the powers of the President to determine, by releasing presidential decrees, the categories of persons who have the right to simplified acquisition of citizenship. This allows for deviation from the Citizenship Law without amending it. In fact, to bolster the army without resorting to another mobilisation – highly unpopular among the Russian public, according to polls – on 4 January 2024, President Putin signed a decree envisaging a fast-track citizenship procedure for foreigners who sign a one-year contract with the Russian Army or volunteer for “army formations” amid the war in Ukraine. Such foreigners would be spared the requirements to speak Russian, be familiar with the country’s history and laws and live in Russia for five consecutive years under a residence permit. The benefits also extend to the recruits’ spouses, children, and parents. Moreover, a decision should now be taken in one month. This new decree replaced the earlier two of September 2022 and May 2023, further simplifying matters.

There is little indication that the current trajectory of Russia's migration policy, which shifted towards a focus on law enforcement following the dissolution of Russia's Federal Migration Service in 2016 and has since reinforced its securitization approach, particularly in the wake of Russia's invasion of Ukraine, will see any change in the opposite direction in 2024. It will be important to observe the data on citizenship of EECA nationals and particularly nationals of Tajikistan, who have been the top recipients, in an increasing trend, of Russian passports in recent years.

Conclusions for 2024

As in recent years, mobility and migration in the region of Eastern Europe and Central Asia in 2023 was catalysed by violent conflict and structural migration drivers, such as economic disparities, demographic imbalances, and the growing impacts of climate change, leading to increased forced movements and high levels of economic migration. Following Russia's invasion of Ukraine, large-scale displacement remains one of the key defining features of the EECA region, with this trend unlikely to reverse in the near future. With the war having entered its third year and with no decisive breakthrough on the battlefield in 2023, the eventual return of millions of displaced Ukrainians remains increasingly challenged, while their integration into the host communities becomes increasingly important. Looking beyond 2024, future migration patterns will not solely be determined by the outcome of the war and the security situation. It will also be determined by Ukraine's economic prospects, as well as the success of integration of Ukrainians and overall well-being in host countries. The persistent potential for violence in other parts of EECA, as the most recent developments in Armenia and Azerbaijan have shown, remains high and requires careful attention in 2024. This includes areas like the border regions of Tajikistan and Kyrgyzstan, as well as Moldova's Transnistria region, which called for Russia's support "amid increasing pressure from Moldova" in late February 2024. While the likelihood of conflict escalation in other regions like northern Kazakhstan and Georgia remains low, it is not entirely improbable.

Beyond conflict-driven migration, labour migration remains a significant aspect for both sending and receiving countries of the EECA region. Many countries rely on migrant remittances in the absence of long-overdue structural economic reforms. Although the war in Ukraine has not halted Russia as a destination for Central Asian migrant workers, there is a noticeable hesitancy among migrants to seek opportunities in a country embroiled in conflict. This could exacerbate Russia's existing labour shortages and subsequently impact its economic growth. Concurrently, an increasing number of EECA nations are turning to the EU as a destination for work, a trend expected to continue in 2024. By strengthening existing and opening new legal pathways to EU labour markets, the EU would both address labour market shortages and declining demography, while supporting the sending countries in their efforts to diversity labour migration destinations and offer alternatives to Russia as a recipient of their labour force. Meanwhile, Russian emigrants from the 2022 wave continue to circulate within the EECA region, contributing to the area's historical pattern of human movement and ethnic diversity. However, many of these emigrants are also actively seeking routes to the EU or the US, reflecting broader trends in international migration.

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