ICMPD
International Centre for
Migration Policy Development

ICMPD
Migration Outlook 2025

Eastern Europe & Central Asia

Six migration issues to look out for in 2025

Origins, key events and priorities

ICMPD
Migration Outlook 2025
Eastern Europe & Central Asia

Six migration issues to look out for in 2025

Origins, key events and priorities for Europe

Table of Contents

Six migration issues to look out for in 2025

Six migration issues to look out for in 2025

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 Millions of Ukrainians staying abroad and uprooted internally remain navigating the uncertainty of prolonged displacement

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. Like a year ago, in early 2025, nearly one-third of Ukraine's population remains displaced either internally or across borders. According to UNHCR, there are 6.9 million Ukrainian refugees worldwide, with 6.3 million in Europe and almost 4.3 million in EU Member States. After more than three years of war, the military front in Ukraine has largely settled into a stalemate. Despite minimal shifts in the front line, the war remains intense, and a comprehensive ceasefire remains elusive in early 2025 – as does the mass return of displaced Ukrainians. Meanwhile, the trajectory of displacement will largely depend on how and when the conflict moves toward peace. The different scenarios for 2025 – a long war, a frozen conflict, a Ukrainian victory or a Ukrainian defeat – would have very different implications for refugee movements, return intentions, and regional migration trends. Achieving peace is intimately linked to the fate of Ukraine's displaced people. A ceasefire or peace deal would eventually unlock the possibility of large-scale returns, but only if it yields real safety and if Ukraine's economy can absorb the returnees. Until then, millions will remain navigating the uncertainty of prolonged displacement.

2 The road to end ‘temporariness’ for Ukrainian beneficiaries of temporary protection in the EU and avoid a ‘closing-door-panic’

With the EU’s temporary protection for Ukrainians set to expire in 2026, discussions on an EU-wide transition strategy will likely accelerate in 2025. Several EU Member States have already begun offering national solutions, including transitioning temporary protection to national residence permits and dual-intent integration policies. While these steps help mitigate the downsides of prolonged ‘temporariness’, they may also lead to secondary movements between Member States. A unified approach within the EU could help to avoid such a development. However, in all cases, it would be wise to allow enough time and flexibility, set a harmonised outreach strategy, and avoid rushed decisions among the Ukrainian beneficiaries of temporary protection. Should such protection no longer be required, the EU may also consider introducing circular migration permits to complement its visa-free regime and support Ukraine’s economic recovery. Close coordination with Ukraine will be essential to safeguard its interests, manage return timing and volume, and minimise the strain on infrastructure and social cohesion, including by launching reintegration programmes.

3 Central Asian Labour Migration at a Crossroads

Labour migration from Central Asia remains a crucial economic lifeline but is increasingly in flux. On the one hand, Russia continues to draw millions of workers from countries like Tajikistan, Kyrgyzstan, and Uzbekistan, and remittances from these migrants are vital for their home economies. On the other hand, 2024 saw growing obstacles: Moscow’s tightening migration policies have made the environment less welcoming. In 2025, many Central Asian migrants may reconsider the duration and destination of their journeys. This might result in more short-term or circular trips to Russia instead of long stays, and a greater exploration of alternative destinations within the region and beyond. Notably, Central Asian governments are actively pursuing new labour agreements and opportunities abroad, including in the EU, and flows to the Union have been rapidly growing. In 2023, first-time work permits for nationals of Kazakhstan, Uzbekistan, Kyrgyzstan, and Tajikistan rose by 30%, 39%, 50%, and 63%, respectively, compared to the previous year. With nearly 32,000 workers in stock and over 22,000 new arrivals, Uzbekistan ranked fourth among EECA labour inflows after Ukraine, Belarus, and Russia, making it Central Asia’s top labour-sending country to the EU. This trend toward a broader portfolio of migration destinations will be one to watch, as it could gradually reduce the region’s heavy reliance on Russia and reshape traditional mobility patterns.

4 Post-conflict displacement in Armenia

The aftermath of the Armenia-Azerbaijan conflict over Nagorno-Karabakh will shape migration in the Caucasus. Following the late-2024 exodus of ethnic Armenians from Nagorno-Karabakh, Armenia is now housing a large displaced population: roughly one in every 30 people in Armenia is a refugee from this conflict. In 2025, the focus will be on integrating these displaced families and providing sustainable support, even as peace negotiations between Yerevan and Baku continue. The risk of secondary migration is real: without robust integration and economic opportunities, some displaced Armenians may seek to move onward to other countries. How Armenia manages this influx – and whether a durable peace agreement is reached – will be critical for regional mobility dynamics.

5 The non-linear paths to EU membership of Ukraine, Moldova, and Georgia, and EU-Armenia approximation

In 2025, Ukraine and Moldova will continue advancing their EU accession negotiations, having officially launched the process in mid-2024. Both countries have submitted their first screening reports, focusing on the Fundamentals cluster, which will set the pace for further negotiations. Financial support mechanisms like the Ukraine Facility and the Moldova Growth Plan will play a key role in facilitating reforms and economic stabilisation. However, key migration-related reforms – including legislative harmonisation on asylum procedures, border management, and anti-trafficking measures – remain areas of focus for both countries. Meanwhile, Georgia's EU trajectory has stalled, as political tensions and democratic backsliding led the Georgian government to suspend EU accession discussions until 2028. The government's adoption of the controversial 'foreign influence' law, contested parliamentary elections, and rejection of EU financial support led to protests and strained Georgia's relationship with Brussels. In response, the EU suspended parts of the EU-Georgia visa facilitation agreement, further highlighting Georgia's uncertain European path. Conversely, Armenia's engagement with the EU is deepening, with the launch of the EU-Armenia Visa Liberalisation Dialogue in late 2024. This process marks a significant shift in Armenia's foreign policy, as it seeks closer ties with Europe amid geopolitical tensions. The next steps in 2025 will include scoping missions to assess Armenia's readiness for visa-free travel, as well as further legal and institutional reforms to align with EU migration and border management standards.

6 'Security-first' approaches making migration policies more restrictive

Across EECA, migration and security are intersecting in new ways, influencing policy direction in 2025. Russia has increasingly securitised its migration regime – enacting stricter laws and surveillance on foreign residents, partly in response to domestic xenophobia and strategic aims. This means migrant workers in Russia (predominantly from Central Asia) could face more checks, documentation requirements, or pressure, contributing to a more unstable and restrictive migration environment. Likewise, in Central Asia, governments remain on alert due to security spillovers from Afghanistan. The Taliban's rule and ongoing instability next door have made countries like Tajikistan cautious about admitting refugees or asylum seekers from Afghanistan, fearing infiltration by extremist groups. Instances like the late-2024 deportation of

Afghan asylum seekers from Tajikistan highlight this hardening stance. In 2025, national security considerations are expected to continue shaping migration policies – from tighter border controls and vetting to limited protection space for refugees.

Introduction

Introduction

The Eastern Europe and Central Asia (EECA) Migration Outlook presents an analysis of the key events and trends that shaped migration in the EECA region in 2024. Simultaneously, it offers a cautious outlook into areas and issues that may affect migration and mobility to, within, and from EECA in 2025. In a non-exhaustive way, the publication addresses related developments in the twelve EECA countries – 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 to ensure grounded understanding of regional dynamics.

Migration in 2024 continued to be shaped by global instability, geopolitical realignments, and the aftermath of major crises. As highlighted in the ICMPD Migration Outlook 2025, the world is experiencing an increasingly fragmented international order, with systemic rivalries, conflict-driven displacement, economic shocks, and the weaponization of migration influencing global mobility. The countries of Eastern Europe and Central Asia are not immune to these global dynamics, with large-scale conflict-induced displacement emerging as a defining feature of the region, primarily due to Russia's war of aggression against Ukraine, but also the aftermath of other conflicts. The dissolution of the Soviet Union removed many of the structures in place to control ethnic tensions and national rivalries and gave way to what scholars have called 'the wars of Soviet succession', including the fighting in Nagorno-Karabakh, which has led to the displacement of over one million people. Some of these conflicts have been ongoing for thirty years or more and prospects for lasting peace remain low. Meanwhile, domestic political developments are increasingly shaping migration discourses and priorities. In 2024 and early 2025, several countries in the region – Belarus, Georgia, Moldova, and Russia – held important elections, with vastly different outcomes and possible impacts on migration. At the same time, economic and labour migration trends continue to evolve. Traditional corridors are under strain as migrants and their countries of origin weigh economic gains against growing risks in established destination countries, particularly in Russia, which remains the primary labour market for many Central Asian migrants.

This Outlook examines these various developments, starting with an analysis of the situation in Ukraine, Moldova, Central Asia, Armenia, and Azerbaijan. It then switches to regional migration trends, exploring key structural drivers such as economic performance, labour migration patterns within and from the region, displacement and protection dynamics, as well as irregular migration and the return of EECA nationals from the EU. The final section focuses on the EU accession prospects of Ukraine, Moldova, and Georgia, the deepening cooperation between the EU and Armenia, and the evolving migration policy landscape in Russia.

Focus regions

Focus regions

This section delves into migration-related developments in Ukraine amid the ongoing war, examines migration realities in Central Asia and Moldova, and explores the evolution of the Armenia- Azerbaijan conflict, following the restoration of Azerbaijan's sovereignty in Nagorno-Karabakh.

Ukraine

24 February 2025 marked three years since Russia's full-scale invasion of Ukraine, triggering the fastest and largest displacement crisis in Europe since World War II. The aggression against Ukraine has claimed over 200,000 lives, with several hundred thousand more wounded. Ukraine's population has decreased by over 10 million, including nearly five million people living in Russian-occupied territories, a demographic decline that will impact the country for generations.[1]

At its peak, the number of forcibly displaced persons reached nearly 14 million. As of March 2025, nearly one-third of Ukraine's population remains displaced, either internally or across borders. According to UNHCR,[2] there are 6.9 million Ukrainian refugees worldwide, with 6.3 million in Europe and almost 4.3 million in EU Member States – although the latter figure may be lower, as not all Ukrainians revoke their temporary protection status upon leaving the EU. Available figures also confirm return and pendulum migration.

---

1 Diana, M., 'Amid the war, Ukraine is facing a demographic crisis', 12 July 2024, UNFPA Eastern Europe and Central Asia, https://eeca.unfpa.org/en/news/amid-war-ukraine-facing-demographic-crisis, accessed 18 February 2025.

2 UNHCR Data Portal, 'Ukraine Refugee Situation', Ukraine Refugee Situation, accessed 18 February 2025.

In 2024, EU Member States granted temporary protection to some 780,290 additional cases,[3] while the overall number of beneficiaries remained stable.

Ukraine's economy is recovering but remains fragile. In 2024, its real GDP grew by 3.4%, slightly below the forecast, due to poorer harvests, lower-than-expected external demand, and intensified Russian attacks, including summer electricity shortages.[4] Overall, Ukraine's GDP remains over 20% below its 2021 level.[5] At least 1.8 million people have been driven into poverty, affecting a total 9 million. Around 12.7 million individuals require multisectoral humanitarian aid. The war has damaged or destroyed approximately 80% of Ukraine's energy infrastructure, causing constant power shortages and deepening the energy crisis. Infrastructure destruction and electricity disruptions are expected to limit economic growth to 3.2% in 2024 and 2% in 2025. At the same time, the energy infrastructure destructions have not led to major outflows from the attacked areas, despite the challenges posed by intermittent power supply, winter conditions, and disruptions to essential services, which have instead been met with resilience and localised adaptation efforts.[6]

After more than three years of war, the military front in Ukraine has largely settled into a stalemate. Despite minimal shifts in the front line, the war remains intense, and a comprehensive ceasefire seemed out of reach in early 2025[7] – as does the mass return of displaced Ukrainians. Meanwhile, the trajectory of displacement will largely depend on if, when, and how the conflict moves toward peace. Different scenarios – a long war, a frozen conflict, a Ukrainian victory, or a Ukrainian defeat – are expected to have very different implications for refugee movements, return intentions, and regional migration trends. According to a Prague Process analysis, in a protracted war scenario, up to 2.1 million Ukrainians could return home, whereas in the worst-case scenario of total occupation, up to an additional 19 million might flee. While such extreme scenarios are not impossible, they are however not deemed the most likely ones.

In 2024, in response to ongoing large-scale displacement, Ukraine established the Ministry for National Unity, which should liaise with displaced Ukrainians through a network of unity hubs in key host countries.[8] In this regard, the Minister for National Unity emphasised that facilitating return of Ukrainians remains a top priority, but concrete policies and mechanisms to this end have not yet been defined. Meanwhile, return intentions are shifting. Recent polls confirm that an increasing number of Ukrainian refugees aspire to remain in host countries as the war progresses.[9] In 2024, for the first time since 2022, fewer than half of Ukrainians abroad planned to return, primarily due to ongoing instability in their home country. However, intentions and actual returns do not 100% align. Policy decisions and integration prospects in host countries, along with economic conditions and security risks in Ukraine play

3 Eurostat, 'Temporary protection for persons fleeing Ukraine - monthly statistics', Temporary protection for persons fleeing Ukraine - monthly statistics - Statistics Explained, accessed 18 February 2025.

4 National Bank Inflation Report (2025), Q1 2025, IR_2025-Q1.pdf, accessed 24 February 2025.

5 European Parliament, EGOV – Author: Rakic, D., 'Two years of war: The state of the Ukrainian economy in 10 charts', Briefing, February 2024, p. 2.

6 Düvell, F., 'Do Russia's attacks on power infrastructure drive forced migration from Ukraine?', Situational Brief, February 2025, PP%20Situational%20Brief%20Ukraine%20migration%20scenarios%20winter%202024_EN.pdf, accessed 24 February 2025.

7 Centre for Strategic and International Studies, 'Russia's War in Ukraine and the Prospects for Peace', 24 February 2025, https://www.csis.org/analysis/russias-war-ukraine-and-prospects-peace, accessed 10 March 2025.

8 Олексій Чернишов, віцепрем'єр-міністр України - міністр національної єдності України: Ми хочемо створити умови, які зроблять повернення привабливим. – Укрінформ, 31 січня 2025 року [Oleksii Chernyshov, Vice Prime Minister – Minister for National Unity of Ukraine: We would like to create conditions to make the return attractive. – Ukrinform, 31 January 2025], Олексій Чернишов, віцепрем'єр-міністр України - міністр національної єдності України, accessed 21 February 2025.

9 Українські біженці після трьох років за кордоном: скільки їх та хто повернеться?' Четверта хвиля дослідження - Аналітична записка, Центр економічної стратегії, 20 лютого 2025 року ['Ukrainian refugees after three years abroad: how many of them and who is going to return' Fourth wave of the study – Analytical study, Centre for Economic Strategy, 20 February 2025], Українські біженці після трьох років за кордоном. Четверта хвиля дослідження - Centre for Economic Strategy, accessed 24 February 2025.

a role in returns.[10] With some countries – including Norway[11], Ireland[12], and Switzerland[13] – scaling back support, some displaced individuals return home out of necessity rather than choice. With no savings and limited assistance, some return even to frontline areas, despite the security risks. Return does not guarantee stability – 79% of returnees report urgent but unmet humanitarian needs.[14] The situation remains challenging also for IDPs, whose numbers stood at 4.6 million in January 2025, according to Ukrainian sources.[15] They face largely similar financial constraints: rising living costs, unemployment, and mounting debt to cover essentials. There have been reports of IDPs returning to the occupied territories,[16] a concerning trend requiring further study. Since official routes to these territories do not exist, such returns pose serious risks.

Within the EU, in reaction to the protracted situation, the EU Council extended temporary protection to Ukrainians until 4 March 2026. However, the future of this status beyond that date remains unknown. Currently, there is no EU-wide long-term vision regarding the status of nearly five million displaced Ukrainians, impacting their integration, mental and physical well-being, economic prospects, and long-term stability. Without a coordinated approach, Member States have begun offering national solutions, including transitioning temporary protection to national residence permits and dual-intent integration policies. While these steps help mitigate the downsides of prolonged ‘temporariness’, they may also lead to secondary movements between Member States. Due to ongoing instability and serious security concerns across Ukraine, international and national actors do not currently recommend return. Nonetheless, as mentioned above, return and pendulum migration are taking place for various reasons and durations. Discussions about a future return and reintegration framework in both the EU – including at Union and national levels – and in Ukraine should consider not only return volumes and intentions but also the modalities of return, such as temporary or permanent return, or circular migration. Moreover, a harmonised outreach strategy is needed to inform beneficiaries about their options, along with voluntary return programmes linked to Ukraine’s reconstruction, once conditions are safe for return.[17] Close coordination with Ukraine will be essential to safeguard its interests, manage return timing and volume, and minimise the strain on infrastructure and social cohesion.

Last year’s trends suggest that significant levels of migration and return of Ukrainian nationals seeking protection will continue in 2025 as well, at least as long as there is no fundamental change in the security situation in the country. In all scenarios, achieving peace is inseparably linked to the fate of Ukraine’s displaced people. A ceasefire or peace deal would eventually unlock the possibility of large-scale returns, but only if it yields real safety and if Ukraine’s economy can absorb the returnees. Until then, millions will remain navigating the uncertainty of prolonged displacement.

---

10 Sohst, R. Et al. (2024), ‘Exploring Refugees’ Intentions to Return to Ukraine: Data Insights and Policy Responses’, Brussels and Geneva: Migration Policy Institute Europe and International Organization for Migration, Research: Exploring Refugees’ Intentions to Retu.. | migrationpolicy.org, accessed 26 February 2025.

11 Press release, ‘New measures to ensure continued control of immigration’, 30 January 2024, New measures to ensure continued control of immigration - regjeringen.no, accessed 26 February 2025.

12 Hunt, C., ‘Possible cuts to payments to homeowners for hosting of Ukrainians’, RTE, 25 February 2025, Possible cuts to payments for hosting of Ukrainians, accessed 26 February 2025.

13 Servettaz, E., ‘Swiss refugee policy for Ukrainians leaves many questions unanswered’, Swissinfo, 17 January 2025, Switzerland’s new S status policy for Ukrainian refugees SWI swissinfo.ch, accessed 26 February 2025.

14 IFRC, ‘At a tipping point-How financial strains are driving Ukrainians abroad back home’, 14 February 2025, At a tipping point-How financial strains are driving Ukrainians abroad back home | IFRC, accessed 24 February 2025.

15 Dashboard, Internally displaced persons, Information and Computing Center of the Ministry of Social Policy of Ukraine, Дашборд ВПО - ДП ІОЦ, accessed 24 February 2025.

16 Халілов, Р., ‘Додому – в окупацію. Що змушує українців повертатися на захоплені Росією території’, Українська правда, 18 лютого 2025 [Khalilov, R., ‘Home - to occupation. What forces Ukrainians to come back to the occupied territories by Russia’, Ukrayinska Pravda media, 18 February 2024], Пошук житла, роботи та розуміння. Чому деякі ВПО повертаються на окуповані території | Українська правда, accessed 21 February 2024.

17 ICMPD Migration Outlook 2025, https://www.icmpd.org/file/download/63373/file/ICMPD%2520Migration%2520Outlook%25202025.pdf, accessed 18 February 2025.

Moldova

In 2025, Moldova is considered one of the fastest depopulating countries in the world.[18] The 2024 census recorded Moldova's population at 2.4 million[19], a decrease of approximately 13.9% over the past decade.[20] Emigration, economic uncertainty and declining birth rates are the key factors contributing to this trend.[21] Moreover, a recent report predicts a further decline of about 17% over the next eight years[22], reflecting the cumulative impact of migration, natural decrease, and population aging. This demographic shift has led to growing labour shortages across multiple industries, especially in the private sector.[23] To address these challenges, as underscored in the National Development Strategy 'European Moldova 2030', the country has prioritised steps to open its labour market to foreign workers. Throughout 2023-2024, Moldova has gradually expanded the list of countries whose nationals can work in the country without a work permit. Although immigration levels remain low, recent years have seen an increase.

18 Centre for Eastern Studies, 'A disappearing country. Moldova on the verge of a demographic catastrophe', January 2025, https://www.osw.waw.pl/en/publikacje/osw-commentary/2025-01-08/a-disappearing-country-moldova-verge-a-demographic-catastrophe, accessed on 7 March 2025.

19 National Statistics Bureau of Moldova, 'Event to present the preliminary results of the 2024 Population and Housing Census', January 2025, https://statistica.gov.md/ro/eveniment-de-prezentare-a-rezultatelor-preliminare-ale-recensamantului-populatie-12_61627.html, accessed on 7 March 2025.

20 Moldpres, 'Census: Moldova's population stands at 2.4 million citizens in 2024', January 2025, https://www.moldpres.md/eng/society/census-moldova-s-population-stands-at-2-4-million-citizens-in-2024, accessed on 7 March 2025

21 Radio Europa Liberă Moldova, 'De ce în R. Moldova se nasc tot mai puțini copii', February 2025 ['Why are fewer and fewer children being born in the Republic of Moldova', February 2025], https://moldova.europalibera.org/a/33316612.html, accessed on 7 March 2025

22 Centre for Demographic Research (et. al), 'Populația Republicii Moldova la orizontul anului 2040, Chisinau 2024' ['Population of the Republic of Moldova on the horizon of 2040, Chisinau 2024'], https://social.gov.md/wp-content/uploads/2025/01/Raport-analitic-Populatia-Republicii-Moldova-la-orizontul-anului-2040.pdf, accessed on 7 March 2025.

23 Economic Council to the Prime Minister of the Republic of Moldova, '90 percent of Moldovan employers will have stable sales in 2024', https://consecon.gov.md/en/2024/03/13/anofm-80-percent-of-moldovan-employers-will-have-stable-sales-in-2024/, accessed on 7 March 2025.

In 2023, Moldova registered 7,203 immigrants, with the majority coming from Russia, Ukraine, Türkiye, and India.[24]

Since the onset of the war in Ukraine, Moldova emerged as both a transit and destination country for displaced Ukrainians, managing one of the highest per capita refugee influxes in Europe. According to UNHCR, over 1.2 million people entered Moldova, with over 127,000 remaining in the country.[25] The Moldovan government, in cooperation with the international community and civil society, has made significant efforts to accommodate displaced persons. Initially focused on emergency reception measures, the government introduced a Temporary Protection Mechanism in March 2023, modelled after the EU's respective Directive. This was the first time Moldova implemented such a measure, providing displaced persons with a more secure legal status. As of March 2025, 85,421 people have registered for temporary protection, which has been extended until March 2026,[26] while 584 Ukrainians have received other forms of protection, such as asylum or humanitarian status.[27]

24 Inspectorate General for Migration, 'Anuar Statistic: Imigrarea străinilor, azilul și apatridia în Republica Moldova în anul 2023', Chisinau 2024 ['Statistical Yearbook: Immigration of foreigners, asylum and statelessness in the Republic of Moldova in 2023', Chisinau 2024], https://igm.gov.md/wp-content/uploads/2024/07/Anuarul-statistic_ed.-2024.pdf, accessed on 7 March 2025.

25 UNHCR, Operational Data Portal, 'Ukraine Refugee Situation', https://data.unhcr.org/en/situations/ukraine, accessed on 7 March 2025.

26 Inspectorate General for Migration, Press Release: 'Protecția temporară pentru persoanele strămutate din Ucraina se prelungește până pe 1 martie 2026' ['Temporary protection for displaced persons from Ukraine extended until March 1, 2026'], https://igm.gov.md/protectia-temporara-pentru-persoanele-stramutate-din-ucraina-se-prelungeste-pana-pe-1-martie-2026/, accessed on 7 March 2025.

27 Inspectorate General for Migration, Press Release: 'Protecția Temporară: prioritate a Inspectoratului General pentru Migrație în anul 2025' ['Temporary Protection: priority of the General Inspectorate for Migration in 2025'], https://igm.gov.md/protectia-temporara-prioritate-pentru-inspectoratul-general-pentru-migratie-in-anul-2025/, accessed on 7 March 2025.

The evolving geopolitical landscape in the region has propelled Moldova toward a more resolute pursuit of European integration. In March 2022, the country submitted its EU accession application and was granted candidate status in June 2022. Membership negotiations officially opened in December 2023. Throughout 2024, Moldova underwent a comprehensive screening process to align its legislation more closely with the EU acquis.

A defining moment in Moldova's EU path came in late 2024. On 20 October, the country held a nationwide constitutional referendum alongside the first round of its presidential election. The referendum sought public approval to amend the constitution, explicitly enshrining Moldova's goal of EU membership. After a highly charged campaign, the 'Yes' vote prevailed, with 50.4% in favour, securing victory by just a few thousand ballots. Crucially, Moldovans abroad tipped the balance. This historic decision firmly anchored Moldova's future within the EU, with President Maia Sandu hailing it as a 'historic step forward'.[28] Moldova's referendum underscores the diaspora's power to shape home-country policies, signalling both the influence of emigrant communities and the growing importance of engaging them.

Looking ahead to 2025, the government has launched a public consultation on the National Programme on Integration of Foreigners, including displaced persons from Ukraine. The programme, set for 2025–2027, aims to facilitate integration through education, healthcare, employment, housing, social protection, cultural participation, legal services, and community engagement.[29] While this initiative is much needed, its success depends heavily on securing sustainable external funding. In terms of the EU accession process, Moldova plans to begin negotiations on Cluster 1 (Fundamentals). The government aims to draft new sectoral programs on Migration, Asylum, and Integration of Foreigners, as well as on Integrated Border Management. These programs, covering the period up to 2030, will guide the alignment of national regulatory and institutional frameworks with the Common European Asylum System, particularly considering the EU's Pact on Migration and Asylum.

28 Politico, 'Moldova votes yes to joining EU by tiny margin', October 2024, https://www.politico.eu/article/moldova-votes-yes-join-european-union/, accessed on 13 March 2025.

29 Governments Participation Platform, 'Draft Governmental Decision on gradual integration of foreigners, including displaced people from Ukraine', https://particip.gov.md/ro/document/stages/proiectul-hotararii-de-guvern-pentru-aprobarea-programului-national-privind-integrarea-etapizata-a-strainilor-in-republica-moldova-pentru-perioada-2025-2027/13265, accessed on 7 March 2025.

Armenia and Azerbaijan

A little over a year has passed since the self-proclaimed 'Republic of Artsakh' ceased, with Azerbaijan restoring its sovereignty over the part of Karabakh that had remained under the control of local ethnic Armenian forces. Over 115,000 ethnic Armenians who lived in Karabakh fled to Armenia, with the majority leaving within two weeks of Azerbaijan's offensive on 19–20 September 2023.[30] Armenia has recognised them as refugees, granting temporary protection, currently valid until 31 December 2025. By the end of 2024, nearly 110,000 displaced individuals had received temporary protection certificates, while around 6,000 applied for Armenian citizenship.[31] According to the Armenian government, around 25,000 have found work or started businesses in 2024.[32] However, many continue to struggle with securing stable livelihoods and integrating into Armenian society, relying on governmental support,[33] which adds strain to the country's economy.

30 Armenia, 'Europe Region: Population Movement- Operation Update #5', https://reliefweb.int/report/armenia/armenia-europe-region-population-movement-operation-update-5-mdram012-14112024, accessed on 12 February 2025.

31 'UNICEF Armenia Humanitarian Situation Report No. 19 (Year-End)', 31 December 2024, https://reliefweb.int/report/armenia/unicef-armenia-humanitarian-situation-report-no-19-year-end-31-december-2024, accessed on 12 February 2025.

32 'The Government approves the measure and the procedure for providing social support to cover living and other expenses of individuals of separate groups forcibly displaced from Nagorno-Karabakh', https://www.primeminister.am/hy/press-release/item/2024/11/21/Cabinet-meeting/, accessed on 3 February 2025.

33 'Armenia, Europe Region: Population Movement- Operation Update #5', https://reliefweb.int/report/armenia/armenia-europe-region-population-movement-operation-update-5-mdram012-14112024, accessed on 12 February 2025.

90% of displaced households depend heavily on state aid, with food being the primary need for 66% of respondents surveyed in November 2024.[34] From January to October 2024, close to 40,000 of the displaced received cash assistance.[35]

Armenia has provided as much support as its resources allow, even taking a loan from the World Bank.[36] The country has extended social assistance to cover living costs and basic needs of former residents of Nagorno-Karabakh until April 2025, with cash disbursements gradually decreasing by the end of 2025, prioritising specific social groups such as children and the elderly.[37] Those who apply for and receive Armenian citizenship qualify for a special housing program, which shall benefit up to 25,000 displaced families.[38] However, in 2024, only 1% of displaced have obtained housing through government-issued certificates.[39] The international community and humanitarian organisations also continue to engage in aiding the displaced population.

34 Acted, 'Paths to Stability: Socio-Economic Perspectives of Displaced Populations from Nagorno Karabakh after a Year of Displacement (Aragatsotn, Shirak, Ararat, Tavush and Syunik Regions), Needs Assessment report (December 2024)', https://www.acted.org/en/countries/armenia/, accessed on 12 February 2025

35 'Overview of Cash Assistance Coverage Area Map 2023-2024', https://data.unhcr.org/en/documents/details/111894, accessed on 12 February 2025.

36 'Armenia Struggles to Cope with Exodus from Nagorno-Karabakh', https://www.crisisgroup.org/europe-central-asia/caucasus/armenian-azerbaijani-conflict-armenia/armenia-struggles-cope-exodus, accessed on 12 February 2025.

37 'The Government approves the measure and the procedure for providing social support to cover living and other expenses of individuals of separate groups forcibly displaced from Nagorno-Karabakh', https://www.primeminister.am/hy/press-release/item/2024/11/21/Cabinet-meeting/, accessed on 3 February 2025.

38 'The Government approves the procedure for the implementation of the state support housing program for families forcibly displaced from Nagorno-Karabakh', https://www.primeminister.am/en/press-release/item/2024/06/14/Cabinet-meeting/, accessed on 3 February 2025.

39 Acted, 'Paths to Stability: Socio-Economic Perspectives of Displaced Populations from Nagorno Karabakh after a Year of Displacement (Aragatsotn, Shirak, Ararat, Tavush and Syunik Regions), Needs Assessment report (December 2024)', https://www.acted.org/en/countries/armenia/, accessed on 12 February 2025.

Since September 2023, the EU has allocated over €67 million, including €18 million in urgent humanitarian aid via European Commission's DG ECHO. New civil society actions further support capacity building, economic integration, and access to social services. [40]

As challenges persist, so too does uncertainty among the displaced, who 'express deep emotional attachment to their homes in Nagorno-Karabakh and a longing to return'.[41] There are concerns about the potential outflow of Armenians alongside refugees from Nagorno-Karabakh, as many may seek better opportunities abroad. Reports indicate that while some displaced persons attempt to relocate within Armenia or move to other countries (e.g., Russia), these moves are often unsustainable, with many returning after 2–3 months.[42] In 2024, to address these risks, the government has adopted a National Strategy on Improving the Demographic Situation for 2024-2040, which, among other things, aims to reduce migration push factors, foster a favourable environment in Armenia for repatriation and skilled migration, and attract investment from the vast Armenian diaspora.[43]

Peace talks between Armenia and Azerbaijan, mediated by the EU, Russia, and the US, continue but face challenges. Both sides seek a peace treaty, with only two out of 17 discussed points remaining unresolved: one on mutual agreement to refrain from filing international lawsuits and another on re-

40 'The European Union Launches New Civil Society Actions to Support Refugees in Armenia', https://www.eeas.europa.eu/delegations/armenia/european-union-launches-new-civil-society-actions-support-refugees-armenia_en?s=216, accessed on 3 February 2025.

41 Acted, 'Paths to Stability: Socio-Economic Perspectives of Displaced Populations from Nagorno Karabakh after a Year of Displacement (Aragatsotn, Shirak, Ararat, Tavush and Syunik Regions), Needs Assessment report (December 2024)', https://www.acted.org/en/countries/armenia/, accessed on 12 February 2025.

42 Ibid.

43 'Government approves Strategy for Improving the Demographic Situation', https://armenpress.am/en/article/1202496, accessed on 3 February 2025.

stricting foreign representatives at the common border.[44] Border delimitation remains a challenging aspect in Armenia-Azerbaijan negotiations, but also key for achieving long-term peace and stability. In 2024, State Commissions on Delimitation held five meetings, with progress made on sections in Armenia's northeastern region of Tavush.[45]

Further delimitation steps were outlined at a meeting on 16 January 2025.[46] The process, however, does not seem to preclude border incidents, including a deadly clash in February 2024.[47] On 6 January 2025, Baku accused Armenia of firing on Azerbaijani positions in the Lachin region, a claim denied by Yerevan. More recently, President Aliyev's rhetoric has become increasingly harsh, casting doubt on the likelihood of a peace deal in the near future.[48] The EU Mission in Armenia – recently extended until 19 February 2027 – continues to support peace and stability, monitoring the situation and contributing to security in conflict-affected areas, while maintaining its role as an unarmed civilian mission.[49]

44 'Aliyev points out unresolved issues in peace talks with Armenia', https://armenpress.am/en/article/1207738; 'What are 2 issues in peace treaty that have not yet been agreed upon with Azerbaijan? Pashinyan opens brackets', https://news.am/eng/news/864371.html, accessed on 3 February 2025.

45 'Press release on the outcome of the 8th meeting of the State Commissions on the delimitation of the state border between Armenia and Azerbaijan', https://www.mfa.am/en/press-releases/2024/04/19/8th_meeting/12606; 'Press release on the outcome of the 9th meeting of the State Commissions on the delimitation of the state border between Armenia and Azerbaijan', https://www.mfa.am/en/press-releases/2024/05/15/arm_az/12644, accessed on 3 February 2025.

46 'Press release on the outcome of the 11th meeting of the State Commissions on the delimitation of the state border between Armenia and Azerbaijan', https://www.mfa.am/en/press-releases/2025/01/16/arm_az/13039, accessed on 3 February 2025.

47 'Deadly Fighting Reported on Armenian-Azeri Border (UPDATED)', https://www.azatutyun.am/a/32817482.html, accessed on 3 February 2025.

48 https://www.crisisgroup.org/crisiswatch/january-trends-and-february-alerts-2025#armenia, accessed on 12 February 2025

49 Armenian and Azerbaijani border commissions agreed on next stage of delimitation process, but persistent tensions hindered efforts to finalise peace deal; Yerevan strengthened ties with West, 'Armenia: Council extends the mandate of the EU civilian mission for two years', https://www.eeas.europa.eu/delegations/armenia/armenia-council-extends-mandate-eu-civilian-mission-two-years_en, accessed on 3 February 2025.

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. In 2024, several key events have been important for both migration trends and discourse in Central Asia: progress on intra-regional border demarcation, the ongoing diversification of migration destinations amid shifting conditions in Russia and emerging opportunities abroad, and security spillovers from Taliban-ruled Afghanistan.

On 21 February 2025, Kyrgyzstan and Tajikistan finalised **a border delimitation agreement**,[50] resolving the last contested frontier in Central Asia. Pending ratification, the agreement is set to take effect in spring 2025, with demarcation to follow over two years.[51] This step holds significance for Central Asia's regional stability and cross-border movement given decades of territorial disputes and competition over irrigation water and pasture access in the densely populated Fergana Valley, which has previously led to violence and subsequent fatalities.[52] Moreover, in past flare-ups, civilians on Tajik and Kyrgyz sides had to flee, and some remained uprooted. A stable border will help prevent such humanitarian disruptions, reducing the risk of armed conflict and forced migration. Regionally, this agreement completes Central

50 The Cabinet of Ministers of the Kyrgyz Republic, 'Заседание правительственных делегаций по делимитации и демаркации кыргызско-таджикской госграницы: запарафированы важные соглашения' ['Meeting of government delegations on delimitation and demarcation of the Kyrgyz-Tajik state border: important agreements initialled'], https://www.gov.kg/ru/post/s/25011-kyrgyz-tazik-mamlekettik-cek-arasyn-delimitaciyaloo-zana-demarkaciyaloo-boyunca-okmottuk-delegaciyalardyn-zyiyny-maaniluu-kelisimder-bekidi, accessed on 3 March 2025.

51 News Central Asia, 'Граница мира: Кыргызстан и Таджикистан подписали окончательный протокол по делимитации границ' ['Border of Peace: Kyrgyzstan and Tajikistan Support Final Protocol on Border Delimitation'], 24 February 2025, https://www.newscentralasia.net/2025/02/24/granitsa-mira-kyrgyzstan-i-tadzhikistan-podpisali-okonchatelnyy-protokol-po-delimitatsii-granits/, accessed on 3 March 2025.

52 The Diplomat, 'Kyrgyzstan, Tajikistan Finalize Border Agreement', 26 February 2025, Kyrgyzstan, Tajikistan Finalize Border Agreement – The Diplomat, accessed on 3 March 2025.

Asia's post-Soviet border settlements, eliminating a longstanding source of friction and paving the way for deeper cooperation, as seen in plans for a late March 2025 trilateral summit between Kyrgyzstan, Tajikistan, and Uzbekistan.[53] Crucially, improved stability also reduces opportunities for external powers to exploit rifts, with Central Asians showing they can solve their own disputes. It also allows governments to focus on economic development and other challenges, such as those emanating from neighbouring Afghanistan or from climate change, particularly rapid glacier melt.

The **situation in Afghanistan**, following the Taliban takeover in August 2021, continues to require a balancing between humanitarian obligations and hard security concerns across Central Asia. While Afghan refugee numbers in the region remain low compared to the millions in Pakistan and Iran,[54] arrivals since 2021 have sparked unease. As of late 2024, Tajikistan – sharing deep linguistic and cultural ties with Afghanistan's Tajik community – hosts over 40% of Afghan refugees (8,253) and 84% of asylum-seekers (2,115) in Central Asia.[55] However, in December 2024, it deported at least 56 Afghan asylum seekers, including women and children, back to Taliban-controlled territory.[56] The move drew rare domestic criticism[57] and prompted UNHCR to call for an end to forced returns and adherence to non-refoulement obligations.[58] Overall, Central Asian governments hesitate to grant international protection to Afghans already in their countries, fearing it could spur more arrivals, while

53 AKIPress, 'В конце марта пройдет первый трехсторонний саммит президентов Жапарова, Мирзиёева и Рахмона в Худжанде' ['The first trilateral summit of Presidents Japarov, Mirziyoyev and Rahmon will be held in Khujand at the end of March'], 24 February 2025, https://kg.akipress.org/news:2235670?from=portal&place=last, accessed on 4 March 2025.
54 ICMPD, 'Migration Outlook 2025', https://www.icmpd.org/publications/icmpd-migration-outlook, accessed on 4 March 2025.
55 UNHCR, 'Refugee Data Finder', accessed on 4 March 2025.
56 Radio Free Europe, 'Central Asia in Focus: Tajikistan Deports Afghan Asylum Seekers', 17 December 2024, accessed on 4 March 2025.
57 Radio Free Europe, 'Deportation Of Afghans Sparks Rare Outrage In Tajikistan', 11 January 2025, accessed on 4 March 2025.
58 UNHCR Central Asia, 'UNHCR calls on Tajikistan to halt forcible return of Afghan refugees and uphold international protection standards and commitments', accessed on 4 March 2025.

their limited economic, infrastructural, and logistical capacities hinder adequate support.[59] Afghans are also viewed as a security risk, with fears that Taliban-controlled Afghanistan could become a breeding ground for extremists infiltrating Central Asia.[60]

These concerns gained traction in 2024 as reports[61] indicated rising recruitment of Tajik nationals by the Islamic State Khorasan (ISIS-K). The ISIS-K group claimed responsibility for the March 2024 terrorist attack at a concert venue near Moscow,[62] allegedly carried out by nationals of Tajikistan. The attack intensified anti-migrant sentiment in Russia, prompting stricter migration policies that ultimately disproportionately affected Central Asian – above all Tajik – migrants in Russia (read more in the section *Migration Policy Developments*). Radicalisation is a complex challenge, often driven by economic hardship in home countries and alienation in host societies.[63] Tajikistan, particularly vulnerable to both dynamics, faces a dilemma: whether to engage with the Taliban – like other countries of the region[64] – to try to

59 Matusevich, Y. (2024), 'Impacts of Russia's War in Ukraine on Migration in Central Asia', Prague Process Policy Brief, https://www.pragueprocess.eu/en/resources/repository/34-briefs/487-impacts-of-russias-war-in-ukraine-on-migration-in-central-asia, accessed 4 March 2025.
60 IARI, 'Afghanistan's collapse and the ripple effect: security and geopolitical implications', 8 December 2024, https://iari.site/2024/12/08/afghanistans-collapse-and-the-ripple-effect-security-and-geopolitical-implications/; Atlantic Council, 'From Dushanbe to Berlin: The emerging ISIS-K threat - Atlantic Council', 10 October 2024, accessed on 4 March 2025.
61 GIS, Hedlund, S., 'Trouble brewing in Tajikistan', Specter of instability rises in Tajikistan GIS Reports, November 2024; Centre For Eastern Studies, 'Islamic State-Khorasan: global jihad's new front', https://www.osw.waw.pl/en/publikacje/osw-commentary/2024-03-29/islamic-state-khorasan-global-jihads-new-front, March 2024; IARI, 'Afghanistan's collapse and the ripple effect: security and geopolitical implications', 8 December 2024, Afghanistan's collapse and the ripple effect: security and geopolitical implications/; The Hindu, 'SCO countries hold first joint live anti-terror drills with all member states', SCO countries hold first joint live anti-terror drills with all member states - The Hindu, July 2024, accessed on 4 March 2025.
62 Reuters, 'Russia's clampdown on Tajik migrants raises economic and security risks | Reuters', December 2024, accessed on 4 March 2025.
63 Atlantic Council, 'From Dushanbe to Berlin: The emerging ISIS-K threat - Atlantic Council', 10 October 2024, accessed on 4 March 2025
64 Foreign Policy Research Institute, 'Tajikistan's Afghan Conundrum - Foreign Policy Research Institute', November 2024, accessed on 4 March 2025.

counter extremist groups, and how to find ways to support its labour migrants and prevent their marginalisation abroad.

Meanwhile, **outward labour migration and remittances** continue to provide a much-needed lifeline to Central Asian populations, particularly in Tajikistan, Kyrgyzstan, and Uzbekistan. In 2024, Tajikistan became the world's top recipient of remittances as a share of national GDP, while Uzbekistan received the highest volume of remittances in absolute terms among EECA countries.[65] Despite the impact of the war in Ukraine on Russia's economy, the risks of conscription into the Russian military (whether through high pay incentives, coercion, or deception), growing xenophobia, and its tightening migration policies,[66] Russia remains the primary labour market for Tajik, Kyrgyz, and Uzbek workers (read more in the section *Labour migration of EECA nationals to Russia)*. No other destination currently matches Russia's capacity to absorb several million Central Asian labourers annually, including due to its visa-free regimes and Kyrgyzstan's membership in the EAEU.

However, as has been covered in previous Migration Outlooks[67], alternative markets such as the UK, the EU, South Korea, Türkiye, and the Gulf States continue to gradually expand their labour migration schemes for Central Asians. Moreover, aware of their dependence on Russia, Central Asian states are actively seeking new migration opportunities for their nationals too. In September 2024, Germany and Uzbekistan signed a bilateral agreement to facilitate skilled worker migration and streamline returns of individuals without legal residency.[68] In 2025, up to 1,000 Uzbek nurses may be recruited in Germany after completing required training,[69] with future opportunities for thousands more Uzbek workers across various sectors.[70] A similar deal could become a reality for other Central Asian states, according to German statements made at the 2023 Central Asia-Germany summit.[71]

Notably, Central Asian states not only work on forging new agreements with new destinations and employment firms, but also mark this in their policy and strategic documents. In 2024, the presidential decree in Uzbekistan set priorities for encouraging language training in German, English, Korean, and Japanese, with Uzbekistan's 2024–2026 Program for Improving External Labour Migration Processes setting a wide-ranging list of actions targeting 16 EU Member States, the UK, the US, Australia, New Zealand, South Korea, Japan, Qatar, Kuwait.[72]

65 The World Bank Blog, 'In 2024, remittance flows to low- and middle-income countries are expected to reach USD 685 billion, larger than FDI and ODA combined', https://blogs.worldbank.org/en/peoplemove/in-2024--remittance-flows-to-low--and-middle-income-countries-ar, accessed on 4 February 2025.

66 Sahadeo, J. & Morrison, N. (2025), 'Russian Migration Policy at the Crossroads: Trends and Regional Repercussions', Prague Process Policy Brief, https://www.pragueprocess.eu/en/resources/repository/34-briefs/507-russian-migration-policy-at-the-crossroads-trends-and-regional-repercussions, accessed on 6 March 2025.

67 'ICMPD Migration Outlook Eastern Europe and Central Asia 2024' and 'EECA Migration Outlook 2023', accessed on 6 March 2025.

68 Federal Ministry of the Interior and Community of the Federal Republic of Germany, 'Recruiting skilled workers, speeding up returns: Germany and Uzbekistan conclude migration agreement', https://www.bmi.bund.de/SharedDocs/pressemitteilungen/EN/2024/09/usbekistan_migrationsabkommen.html?utm_source=chatgpt.com, accessed on 14 February 2025.

69 UZ Daily, 'Uzbekistan and Germany expand cooperation in migration and employment', February 2025, https://www.uzdaily.uz/en/uzbekistan-and-germany-expand-cooperation-in-migration-and-employment/, accessed on 07 March 2025

70 National News Agency of Uzbekistan, 'The first group of nurses from Uzbekistan will start working in Germany', December 2024, https://uza.uz/ru/posts/pervaya-gruppa-medsester-iz-uzbekistana-nachnet-rabotu-v-germanii_667883, accessed on 07 March 2025.

71 Radio Azzatyk, «Средний коридор», права человека, трудовая миграция. О чем договорились участники саммита «Центральная Азия-Германия» [„Middle Corridor", Human Rights, Labor Migration. What the Participants of the Central Asia-Germany Summit Agreed on], https://rus.azattyk.org/a/32617866.html, accessed on 07 March 2025.

72 Resolution of the President of the Republic of Uzbekistan, 'On additional measures to streamline the processes of carrying out labor activities abroad', ПП-367-сон 17.10.2024. О дополнительных мерах по упорядочению процессов осуществления трудовой деятельности за рубежом, accessed on 07 March 2025.

A year earlier, Tajikistan adopted a new Migration Strategy until 2040 to enhance employment prospects for Tajiks abroad through training and language courses in English, Korean, and Japanese, setting diversification among its key priorities.[73]

In 2025, Central Asia's migration landscape will be shaped by economic demands, regional cooperation, and security concerns. The finalisation of the Kyrgyz-Tajik border agreement promises greater stability, but its success will hinge on sustained diplomacy and local engagement to prevent new disputes. Afghanistan's ongoing instability will keep security high on the regional agenda. Labour migration will remain a crucial economic pillar, but shifting conditions demand a more strategic and proactive approach from governments. The key challenge will be ensuring migration strengthens economic resilience rather than creating new vulnerabilities, as states work to secure remittance flows while safeguarding their citizens abroad.

73 Daryo, 'Tajikistan presents its new migration strategy', https://daryo.uz/en/2023/07/22/tajikistan-presents-its-new-migration-strategy; Speech by the Deputy Minister of Labor, Migration and Employment of the Republic of Tajikistan Sh. Nodiri at the 115th session of the IOM Council (November 26-28, 2024, Geneva), it-7-tajikistan-ru.pdf, accessed on 07 March 2025.

Migration trends in the region

Migration trends in the region

This section covers key migration trends observed in the EECA region in 2024, focusing on the structural drivers and performance of EECA economies, labour mobility patterns, as well as displacement and irregular migration dynamics. 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

The economies of the EECA region continue to experience turbulence, marked by fluctuations in real GDP growth, inflation spikes driven by spillovers from Russia's invasion of Ukraine, and the impact of global economic fragmentation. While real **GDP growth in 2024** is expected to be **moderate** and lower than in 2023 for most countries in the region, **Azerbaijan, Georgia, and Moldova** emerged as top performers.[74] The economies of **Ukraine, Belarus, Moldova and Russia**, which saw the sharpest declines in 2022, have returned to positive growth trajectories in 2024.

74 World Bank, 'Global Economic Prospects', January 2025, https://openknowledge.worldbank.org/server/api/core/bitstreams/e463cf9f-a07e-4848-bf7b-316515429b5d/content, accessed on 4 February 2024.

Table 1. Real GDP (percent change) in the EECA region

Country	2021	2022	2023	2024e	2025f
Armenia	5.8	12.6	8.3	5.5	5.0
Azerbaijan	5.6	4.6	1.1	4.0	2.7
Belarus	2.4	-4.7	3.9	4.0	1.2
Georgia	10.5	11.0	7.5	9.0	6.0
Kazakhstan	4.3	3.2	5.1	4.0	4.7
Kyrgyzstan	5.5	9.0	6.2	5.8	4.5
Moldova	13.9	-4.6	0.7	2.8	3.9
Russia	5.6	-1.2	3.6	3.4	1.6
Tajikistan	9.4	8.0	8.3	8.0	6.0
Turkmenistan	No data available				
Ukraine	3.4	-28.8	5.3	3.2	2.0
Uzbekistan	7.4	6.0	6.3	6.0	5.8

Source: World Bank, Global Economic Prospects January 2025[75]

Despite ongoing geopolitical challenges and risks, **Georgia** continues to demonstrate the highest economic growth in the region. Experts attribute this growth to strong domestic consumption, which helped to expand domestic investment. In addition, unemployment fell to 14% in the first quarter of 2024, and inflation slowed due to a relatively stable exchange rate and prudent fiscal policies.[76] **Moldova**'s economy faced a sharp downturn in 2022, plummeting from almost 14% growth in 2021 to a contraction of -4.6% in 2022. While growth remained weak in 2023, experts observed encouraging signs of gradual recovery in 2024, in particular in its second half. Domestic trade has been identified as a key growth driver, supported by rising disposable incomes. The Moldovan IT sector also continues to perform strongly, benefiting from increased external demand and ongoing digitalisation efforts in the country. The financial, energy and construction sectors – after facing crisis in 2022/2023 – are showing strong signs of recovery in 2024, contributing to overall economic stabilisation.[77] Similarly, **Azerbaijan**'s economy has begun to recover and stabilise in 2024. This recovery is mainly attributed to the robust growth of the non-oil GDP, although the oil and gas sectors have also seen positive growth in 2024, primarily due to increased demand for Azerbaijani gas from Europe. Thanks to a tight monetary policy and falling food prices, inflation was curbed at the end of 2023 and in 2024. While annual income growth stood at only 5%, it still translated into solid real income gains, given the low inflation rate.[78]

A significant shift in trade patterns between Russia and countries in Central Asia and the South Caucasus was already evident in 2023, and this trend has continued through 2024, with projections indicating further growth in 2025. This shift primarily reflects efforts to re-route trade flows to circumvent EU restrictions and sanctions. As a result, trade with Russia has increased sharply, manufacturing sectors in some Central Asian countries have expanded, and imports from the EU, Türkiye, and China increased. In the case of Kazakhstan, exports to China have also risen notably.[79]

In 2022, almost all countries in the region, except for Russia and Ukraine, received higher remittances, largely driven by the relocation of hundreds of thousands of Russians who arrived in EECA countries throughout 2022, bringing their finances with them. However, by 2023, remittances in some countries had returned to pre-pandemic levels and continued to decline in 2024. This downward trend was evident in **Armenia**, where inward remittances in

75 Ibid.
76 Asian Development Bank, 'ADB Raises 2024 Growth Forecast for Georgia', https://www.adb.org/news/adb-raises-2024-growth-forecast-georgia, accessed on 4 February 2025.
77 World Bank, 'Moldova's economic update', October 2024, https://thedocs.worldbank.org/en/doc/1ec6c88ebadf43eb174efb8bab3d8452-0080012024/original/Moldova-Economic-Update.pdf, accessed on 4 February 2025.
78 European Bank for Reconstruction and Development, Country Assessments, 'Azerbaijan', https://www.ebrd.com/publications/transition-report-202425-azerbaijan#:~:text=We%20forecast%20real%20GDP%20growth,geopolitical%20fragility%20in%20the%20region, accessed on 4 February 2025.
79 Oxford Economics, Research Briefing, 'Ex-Soviet economies boosted by Russia trade', June 2024, https://www.oxfordeconomics.com/wp-content/uploads/2024/06/20240617-RB-Trade-Re-routing-ex-USSR.pdf, accessed on 4 February 2025.

2024 fell by 38% compared to 2022, in **Azerbaijan**, where they dropped by a staggering 91%, and in **Kazakhstan**, which saw a 47% decline. In another group of countries – **Georgia, Tajikistan, and Uzbekistan** – remittances initially declined in 2023 but rebounded in 2024, exceeding 2022 levels. Specifically, Georgia recorded a 14% increase in remittance inflows in 2024 compared to 2022 and a 5% rise compared to 2023. In Tajikistan, remittances grew by 10% compared to 2022 and 7%, compared to 2023, while Uzbekistan saw increases of 7% and 17%, respectively. Meanwhile, in **Belarus, Kyrgyzstan, and Moldova**, remittance inflows have remained stable over the past three years. Finally, **Russia** and **Ukraine** continue to experience declining remittance levels.[80]

Table 2. Migration remittances inflows to the EECA region (US$ million)

Country	2021	2022	2023	2024e	% of GDP, 2024
Armenia	1,557	2,031	1,452	1,278	5.0%
Azerbaijan	1,527	3,950	1,913	1,569	2.0%
Belarus	1,150	1,487	1,261	1, 217	1.8%
Georgia	2,644	3,854	4,201	4,411	13.4%
Kazakhstan	310	481	304	258	0.1%
Kyrgyzstan	3,012	3,225	2,850	3,221	23.7%
Moldova	2,119	2,038	2,012	1,900	10.4%
Russia	9,647	7,200	8,800	5,000	0.2%
Tajikistan	2,922	5,346	4,634	5,885	45.4%
Turkmenistan	No data available				
Ukraine	18,060	16,783	14,967	12,572	6.7%
Uzbekistan	9,277	15,512	14,169	16,578	16.9%

Source: World Bank, Remittances data[81]

80 World Bank Remittances data, https://drive.google.com/drive/folders/1vrGXeAf_6VH64kTC_pIsHNvHfQyyocYj, accessed on 4 February 2025.
81 Ibid.

Uzbekistan and Ukraine are among the world's top 20 remittance-receiving countries in absolute numbers, according to the World Bank. In absolute terms, Uzbekistan has become the EECA's largest recipient of remittances, surpassing Ukraine, where remittances inflows have been declining since 2022. It is estimated that in 2024, Uzbekistan received USD 16.6 billion in remittances, ranking 10th globally, while Ukraine occupies 13th place with an estimated USD 12.6 billion in 2024. Within the EECA region, Ukraine is followed by Tajikistan, which received USD 5,885 billion in remittances in 2024.

Looking at historical trends, three Central Asian countries – Kyrgyzstan, Tajikistan, and Uzbekistan – have emerged as large migrant-sending countries over the past two decades. Among all lower-middle-income countries worldwide, **Tajikistan** has the highest economic dependence on remittances, with money transfers accounting for 45.4% of its GDP in 2024. **Kyrgyzstan** ranks 8th, with remittances making up 23.7% of GDP, while **Uzbekistan** stands at 18th place, with 16.9%. **Georgia** rounds out the global top 20, with remittances constituting 13.7% of its GDP.[82]

82 The World Bank Blog, 'In 2024, remittance flows to low- and middle-income countries are expected to reach USD 685 billion, larger than FDI and ODA combined', 18 December 2024, https://blogs.worldbank.org/en/peoplemove/in-2024--remittance-flows-to-low--and-middle-income-countries-ar, accessed on 4 February 2025.

Forced displacement and international protection

Three years after Russia's full-scale invasion of Ukraine, close to ten million Ukrainians remain displaced within or outside Ukraine's international borders, marking the largest displacement situation in the EECA region. More than 6.3 million Ukrainians have registered for temporary protection (or similar national protection schemes) in Europe.[83] Within the EU, Poland and Germany host the majority of displaced Ukrainians (1,125,985 and 986,920 persons, respectively).[84] According to UNHCR, more than 1.2 million people from Ukraine were registered in Russia, although the latest available data record is from June 2024.[85]

As in previous years, the number of asylum applications submitted by citizens of countries of the EECA region increased in 2023 compared to 2022, with **Moldova** being the only exception (see Table 3). While statistical data for 2024 was not available at the time of writing, early estimates from the first six months confirm that this upward trend has continued. Notably, the number of asylum seekers from **Russia and Uzbekistan** has doubled in 2023 compared to the previous year. Among EECA nationals, Belarusian asylum seekers had the highest recognition rates in 2023, with 465 persons granted refugee status, and 1,342 receiving other forms of protection globally. High recognition rates were also recorded for applicants from Azerbaijan (303 granted refugee status, and 62 other forms of protection), Russia (4,102 granted refugee status, and 533 other forms of protection) and Turkmenistan (84 granted refugee status). Despite a steady increase in asylum applications from Georgian citizens between 2020 and 2023, their recognition rate remains among the lowest at just 1.7%. Moldovan nationals, however, face an even lower recognition rate – just slightly above 1% – the lowest among all EECA countries. The number of Moldovan asylum seekers decreased by 28% in 2023 compared to 2022.[86]

Table 3. UNHCR data on asylum applications submitted by the citizens of EECA countries (except Ukraine) globally

Country of origin	2020	2021	2022	2023	First 6 months of 2024	Recognition rate 2023[87]
Armenia	4,201	5,573	11,096	12,250	6,512	2.8
Azerbaijan	2,484	2,591	4,687	5,672	3,537	6.4
Belarus	2,042	4,674	7,859	9,343	3,626	19.3
Georgia	12,501	20,154	42,424	46,303	16,433	1.8
Kazakhstan	2,582	1,455	5,120	6,563	2,819	3.2
Kyrgyzstan	1,144	904	2,679	5,603	3,792	2.1
Moldova	4,939	10,032	10,472	7,597	3,253	1.1
Russia	15,925	16,903	42,924	81,075	29,185	5.7
Tajikistan	1,219	1,267	3,314	4,926	3,950	6
Turkmenistan	177	225	616	1,527	778	5.5
Uzbekistan	2,931	2,251	6,759	14,868	8,351	2.1

Source: UNHCR Refugee Data Finder

In the first six months of 2024, the United States emerged as the top destination for asylum seekers from Armenia, Kazakhstan, Kyrgyzstan, Russia, Turkmenistan, and Uzbekistan. Meanwhile, the majority of asylum applications from Azerbaijani, Georgian, and Moldovan nationals were submitted

83 UNHCR Refugee Situation Ukraine, https://data.unhcr.org/en/situations/ukraine, accessed on 4 February 2025.

84 EUROSTAT data on beneficiaries of temporary protection at the end of December 2024, https://ec.europa.eu/eurostat/web/main/data/database, accessed on 10 February 2025.

85 UNHCR, 'Refugee Situation Ukraine', https://data.unhcr.org/en/situations/ukraine, accessed on 4 February 2025.

86 UNHCR, 'Refugee Data finder', https://www.unhcr.org/refugee-statistics, accessed on 10 February 2025.

87 The recognition rate is estimated based on the number of applications submitted in 2023 and the total number of positive decisions (including refugee status and subsidiary protection) issued within the same year. UNHCR, 'Refugee Data finder', https://www.unhcr.org/refugee-statistics, accessed on 10 February 2025.

in Germany. France and Poland are among other key destinations for asylum seekers from Armenia and Belarus, respectively. Notably, South Korea has also appeared as a major destination for asylum seekers from Kazakhstan, Kyrgyzstan, Russia, Turkmenistan, and Uzbekistan. The increase in Russian asylum seekers in South Korea may be attributed to the country's visa-free regime for Russian citizens and their exodus following Russia's invasion of Ukraine and subsequent military mobilisation in September 2022. The growing number of asylum applications in South Korea from certain Central Asian countries also points to the emergence of new migration routes. In recent years, South Korea has been attracting a growing number of Central Asian labour migrants, who are seeking job opportunities beyond Russia. Another notable development in the first half of 2024 was the rise in Tajik asylum seekers in Kyrgyzstan as their primary destination, with 1,602 applications recorded.[88]

EUROSTAT data largely reflects these global trends regarding asylum applications submitted by EECA nationals. In 2023, compared to 2022, the most significant increase was observed among Russian applicants, whose numbers increased by 41%. Of these applications, 40% were lodged in Germany, 22% in France, and 8.5% in Spain.[89] Applications submitted by citizens of Armenia, Azerbaijan, Belarus, Kazakhstan, Kyrgyzstan, and Uzbekistan also saw a slight increase in 2023. Conversely, nationals of Georgia, Moldova, Tajikistan, Turkmenistan, and Ukraine[90] submitted fewer applications in the same year. The most significant decreases were recorded among Ukrainian applicants (48.2%), followed by Moldovans (27%), and Georgians (15.9%). While Germany remains a preferred destination for asylum seekers from EECA region, it is not always the top choice. For instance, the majority of Ukrainian asylum seekers submitted their claims in Estonia (29.5%) and France (26.8%). 69% of

88 Ibid.

89 EUROSTAT data on asylum applications, https://ec.europa.eu/eurostat/web/main/data/database, accessed on 10 February 2025.

90 Here, we discuss individual applications for international protection (refugee status and/or subsidiary protection) submitted by Ukrainian citizens, which differ from the temporary protection procedure.

Belarusian asylum seekers applied in Poland. France, as in the past, remained the leading destination for asylum seekers from Armenia (47%). Meanwhile, more than half of applicants from Uzbekistan and Kyrgyzstan sought asylum in Sweden and Italy, respectively.[91]

Table 4. EUROSTAT data on asylum applications submitted by citizens of EECA countries in EU MS

EECA country of origin	2021	2022	2023	Top 3 destination EU MS in 2023	Recognition rate in 2023[92]
Armenia	2,105	4,470	5,175	FR, DE, BE	4.6
Azerbaijan	895	2,430	2,600	DE, FR, SE	10.3
Belarus	3,440	4,990	5,100	PL, DE, LT	68.9
Georgia	12,440	25,940	21,818	DE, FR, IT	8.05
Kazakhstan	230	565	575	FR, SE, DE	11.3
Kyrgyzstan	125	440	465	IT, SE, DE	12.9
Moldova	5,055	5,420	3,955	DE, BE, NL	2.9
Russia	4,385	13,345	18,860	DE, FR, ES	19.1
Tajikistan	445	1,380	750	DE, PL, FR	25.3
Turkmenistan	75	320	210	DE, PL, NO	23
Ukraine[93]	5,325	24,690	12,790	EE, FR, PL	73.3
Uzbekistan	285	1,140	1,160	SE, DE, CZ	9.05

Source: EUROSTAT asylum data

91 EUROSTAT data on asylum applications, https://ec.europa.eu/eurostat/web/main/data/database, accessed on 10 February 2025.

92 The recognition rate is estimated based on the number of applications submitted in 2023 and the total number of positive decisions (including refugee status and subsidiary protection) issued within the same year. EUROSTAT data on asylum applications, https://ec.europa.eu/eurostat/web/main/data/database, accessed on 10 February 2025.

93 The number of applications for international protection, distinct from temporary protection.

In 2023, the highest recognition rate for international protection was recorded among Ukrainian applicants, with 73.3% of cases approved (9,380 positive decisions granting subsidiary protection, and 315 granting refugee status). This was followed by Belarusian applicants, with a recognition rate of 68.9%, and Russian applicants, with 19.1%. The majority of Belarusian beneficiaries of international protection received subsidiary protection status, accounting for 78% of all positive decisions. In contrast, most Russian beneficiaries were granted refugee status, making up 85% of the total positive decisions.

Another important aspect is the number of non-Ukrainian beneficiaries of temporary protection. By the end of 2024, some 70,100 third country[94] nationals had been granted temporary protection in the EU, with nearly half (34,215) coming from the EECA region. Russian citizens led this group, with 12,380 beneficiaries, primarily registered in Germany, Spain, and Poland. Overall, Germany remained the main destination for EECA nationals benefiting from temporary protection.[95]

94 In this case: non-Ukrainian citizens, who resided in Ukraine on 24 February 2022 and left to the EU because of the Russian invasion.

95 EUROSTAT data on beneficiaries of temporary protection at the end of December 2024, https://ec.europa.eu/eurostat/web/main/data/database, accessed on 10 February 2025.

Table 5. EUROSTAT data on beneficiaries of temporary protection from EECA region at the end of 2024

EECA country of origin	2024
Armenia	3,270
Azerbaijan	4,235
Belarus	2,670
Georgia	3,565
Kazakhstan	485
Kyrgyzstan	310
Moldova	3,730
Russia	12,380
Tajikistan	830
Turkmenistan	1,450
Ukraine	4,189,980
Uzbekistan	1,290

Source: EUROSTAT temporary protection data

Internal displacement remains a persistent and complex challenge across many EECA countries. Since 2014, **Ukraine** has faced a significant conflict-driven displacement. By 2021, over 800,000 internally displaced persons (IDPs) were officially registered in Ukraine.[96] However, following Russia's full-scale invasion in 2022, internal displacement surged, affecting approximately 16% of the population, or close to seven million people, at its peak. The majority of Ukrainian IDPs are women, and many of them face heightened vulnerabilities. One-third of IDP households include a chronically ill member, while a quarter include persons with disabilities. Furthermore, nearly a third of all IDPs have experienced at least one secondary displacement, including

96 Internal Displacement Monitoring Centre, Global Internal Displacement Database | IDMC (internal-displacement.org), accessed on 10 February 2025.

those originally displaced in 2014.[97] As of the end of 2023, the number of IDPs in Ukraine is estimated at 3.7 million. However, this figure remains fluid, as some displaced persons return to their places of origin, while others leave the country – neither of which necessarily represents a durable solution to their displacement.[98] Challenges for social cohesion have also emerged, with some 20% of IDPs reporting tensions with host communities, particularly in Ukraine's western regions, largely due to perceived disparities in access to cash assistance.[99] Geographically, many IDPs reside in the country's eastern regions. The highest concentration is found in Dnipropetrovska Oblast (14%), Kharkivska Oblast (12%), Kyiv City (11%), and Kyivska Oblast (8%). Almost a third of all IDPs remain in frontline areas.[100]

In 2022–2023, at least 60,000 people became internally displaced in **Russia**, mainly from regions bordering Ukraine, due to cross-border shelling.[101] Further, at least 150,000 people were displaced due to Ukrainian counteroffensives in Russia's Kursk oblast.[102] Russia also recorded nearly 15,000 displacements due to natural disasters, particularly in Russia's Far East region.[103]

Over 100,000 ethnic Armenians have resettled in different regions of **Armenia** after the de facto autonomy of Nagorno-Karabakh came to an end. One in every 30 people living in Armenia is a displaced person. While the Armenian government has, with donor support, provided assistance to IDPs, long-term support remains a challenge, particularly given that a quarter of the country's population lives below the official poverty line.[104]

More than 650,000 people have been reported as internally displaced in **Azerbaijan**.[105] **Georgia** has also experienced significant internal displacement, dating back to the events of 1991–1993 and 2008. Today, the country has an estimated 311,000 displaced people.[106] More recent displacements have been driven by natural disasters. Between 2020 and 2023, over 1,500 people were forced to relocate within the country due to floods, landslides, dry mass movements, and storms.

Displacement driven by 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** – one of the world's most climate-vulnerable regions. Environmental damage caused by climate change, combined with historical disputes over water resources, poses a risk. Tensions between farmers over access to water 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.[107]

97 EU Asylum Agency, Joint EUAA, IOM and OECD report (2022), 'Forced displacement from and within Ukraine: Profiles, experiences, and aspirations of affected population', October 2022, https://euaa.europa.eu/sites/default/files/publications/2022-11/2022_11_09_Forced_Displacement_Ukraine_JointReport_EUAA_IOM_OECD_0.pdf, accessed on 10 February 2025.
98 Internal Displacement Monitoring Centre, 'Ukraine', https://www.internal-displacement.org/countries/ukraine/, accessed on 14 February 2025.
99 Ibid.
100 IOM, 'Internal Displacement Report', https://dtm.iom.int/ukraine, accessed on 14 February 2025.
101 Internal Displacement Monitoring Centre, 'GRID 2024', https://www.internal-displacement.org/global-report/grid2024/, accessed on 14 February 2025.
102 Sever Realii, Radio Liberty, https://www.severreal.org/a/budut-zazhimat-i-lgat-bezhentsy-kurskoy-oblasti-trebuyut-kompensatsiy-za-zhile/33200904.html, accessed on 14 February 2025.
103 Internal Displacement Monitoring Centre, 'GRID 2024', https://www.internal-displacement.org/global-report/grid2024/, accessed on 14 February 2025.
104 Crisis Group, https://www.crisisgroup.org/europe-central-asia/caucasus/armenian-azerbaijani-conflict-armenia/armenia-struggles-cope-exodus, accessed on 14 February 2025.
105 Internal Displacement Monitoring Centre, 'GRID 2024', https://www.internal-displacement.org/global-report/grid2024/, accessed on 14 February 2025.
106 Internal Displacement Monitoring Centre, 'Georgia', https://www.internal-displacement.org/countries/georgia/, accessed on 14 February 2025.
107 Internal Displacement Monitoring Centre, 'GRID 2022', https://www.internal-displacement.org/sites/default/files/publications/documents/IDMC_GRID_2022_LR.pdf. unhcr_-_global_report_on_law_and_policy_on_internal_displacement_hi-res.pdf (globalprotectioncluster.org).

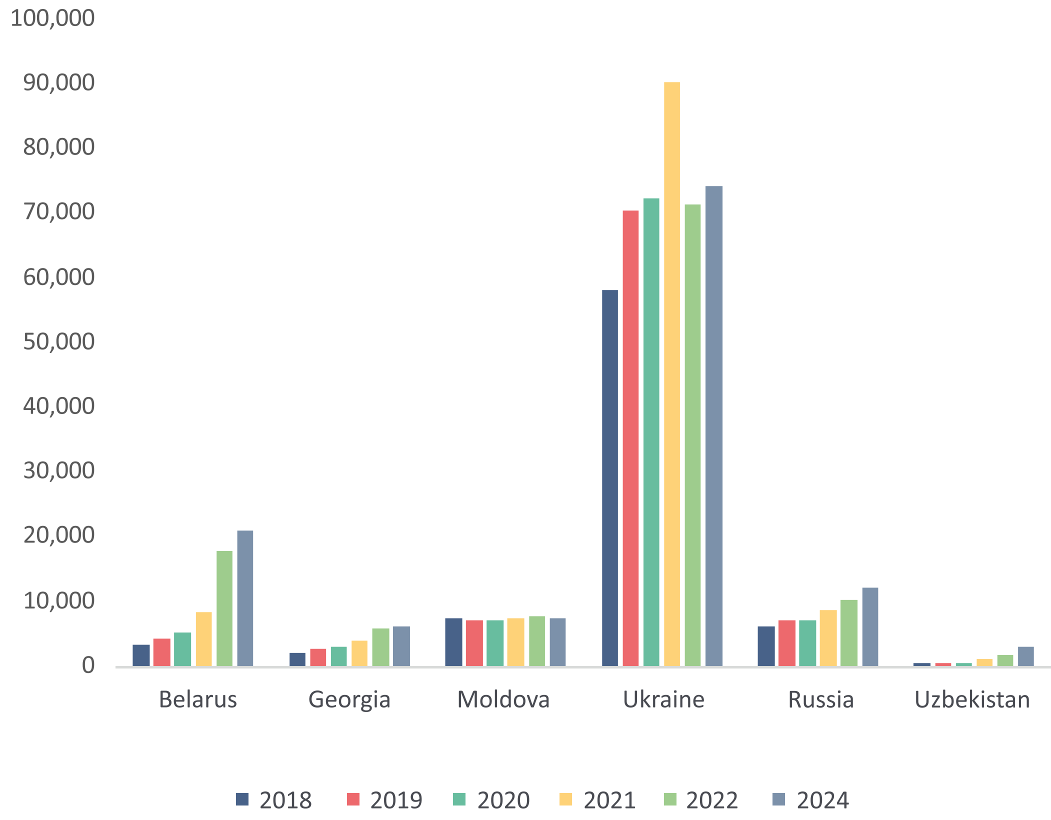
Labour migration from and within the region

Labour migration remains one of the key forms of mobility in the EECA region, playing a vital role in the economies of EECA countries. For the fourth consecutive year, the migration outlook observes labour migration flows from EECA countries to two primary destinations – the EU and Russia. While traditional drivers of migration persist, new factors such as the war in Ukraine, economic and geopolitical uncertainty, and Russia's tightening migration policies are reshaping regional mobility patterns.

Labour migration of EECA nationals to the EU

The EU's role as a destination for EECA labour migrants remains strong and continues to expand. In 2023, the number of valid employment permits held by EECA nationals in the EU increased by approximately 118,000 compared to 2022, surpassing 1.3 million.[108] Despite year-to-year fluctuations, EECA labour migrants consistently account for around 25% of all foreign labour in the EU, reaffirming the region's strong presence in the European labour market.
As in previous years, nationals of Ukraine, Belarus, Russia, Moldova, and Georgia dominated EECA labour migration to the EU, holding over 90% of all valid work permits issued to the region's workers in 2023. Ukrainians remained the largest group, with over 740,000 valid work permits by the end of 2023. Following a sharp decline in 2022, the stock of Ukrainian labour migrants saw a slight rebound. Conversely, the number of first-time work permits issued to Ukrainians continued to decline, from 768,543 in 2021 to 275,719 in 2022, and further down to 220,000 in 2023. The growing stock of labour migrants against declining new arrivals suggests that many Ukrainians who arrived under humanitarian grounds are transiting from temporary protection toward longer-term economic integration and formal employment. A study by the German Institute for Employment Research confirms rising employment rates among Ukrainians under temporary protection. By early 2024, several countries – including Lithuania, Sweden, the UK, the Netherlands, Poland, and Czechia – recorded employment rates at or above 50%. Even in countries with lower employment rates, significant increases were observed: Austria saw a 60.8% rise, Switzerland 42.3%, and Germany 32.5% between late 2022 and early 2024.[109]

Figure 1. All valid residence permits issued for employment in the EU to citizens of selected EECA countries between 2018 and 2023



Source: Eurostat

108 Eurostat, 'All valid permits by reason, length of validity and citizenship on 31 December of each year', https://ec.europa.eu/eurostat/databrowser/view/migr_resvalid__custom_15510885/default/table, accessed on 21 February 2025.

109 ICMPD, 'Migration Outlook 2025', https://www.icmpd.org/publications/icmpd-migration-outlook, accessed on 21 February 2025.

Belarusian migration to the EU has continued its upward trend, with 209,000 valid work permits in 2023 and over 147,000 first-time permits issued. The 2020 political crisis, the war in Ukraine, and Belarus's alignment with Moscow remain key drivers of outward labour migration, pushing more Belarusians to seek work in the EU. Similarly, Armenian and Azerbaijani labour migration to the EU is growing, with Azerbaijan exhibiting a stronger upward trend. In contrast, inflows from Georgia and Russia have declined, by 30% and 17%, respectively, compared to 2022. However, the stock of Russian and Georgian migrant workers in the EU has increased, reaching nearly 122,000 and close to 64,000, respectively. This suggests that those already in the EU are staying longer and securing stable employment. Given ongoing political uncertainties in Georgia, migration flows from the country may rise in 2025. Meanwhile, flows from Russia are likely to remain at current levels, depending on EU Member States' policies and the political situation within and around Russia. Moldova stands out as the only EECA country experiencing declines in both new arrivals and the total stock of migrant workers. Despite minor fluctuations, the number of Moldovan labour migrants in the EU has remained remarkably stable at around 75,000 since 2018. First-time work permits have also hovered around 10,000 annually, except for a peak of 13,631 in 2022 and a dip to 6,312 in 2020. This stability suggests that new arrivals have plateaued, with most Moldovan migrants already well integrated into the EU's labour market and transitioning into long-term residency.

Migration from Central Asia remains a smaller share of EECA labour migration to the EU – around 6% of the 1.3 million valid work permits – but is growing rapidly. In 2023, first-time work permits for nationals of Kazakhstan, Uzbekistan, Kyrgyzstan, and Tajikistan rose by 30%, 39%, 50%, and 63%, respectively, compared to the previous year. With nearly 32,000 workers in stock and over 22,000 new arrivals, Uzbekistan ranked fourth among EECA labour inflows after Ukraine, Belarus, and Russia, making it Central Asia's top labour-sending country to the EU. Historical data suggests that Central Asian migration to the EU remains largely temporary, short-term, or cyclical in nature.

Poland continues to be the primary gateway for EECA migrants, issuing the most first-time and valid work permits for nationals of eight of twelve EECA countries.[110] Lithuania is emerging as a new destination, particularly for Central Asian, Belarusian, and Azerbaijani migrants. Italy remains an important destination for Moldovan, Ukrainian, Georgian, and Russian workers, although it attracts few new EECA arrivals. Meanwhile, Germany has become the top destination for Russian labour migrants. Compared to other EECA countries, Russian labour migration is more dispersed, with notable flows to Germany, Spain, Cyprus, and other Western European countries.

The future of labour migration patterns from EECA to the EU will hinge on multiple factors, including the EU's legal pathways for regional migrants, particularly from Central Asia, policy decisions regarding Ukrainian beneficiaries of temporary protection, and the broader evolution of the war in Ukraine.

Labour migration of EECA nationals to Russia

Labour migrants from just three Central Asian countries – Uzbekistan, Tajikistan, and Kyrgyzstan – are considered as forming the backbone of Russia's low-income labour sectors. Since the onset of the war in Ukraine their role has expanded across various economic domains, driven by Russia's fast-shrinking labour supply.

Assessing the true scale of labour migration to Russia remains challenging due to inconsistent and fragmented statistics. In 2024, Russia's Ministry of Internal Affairs[111] reported rising deportations and entry bans, while

110 In 2023, Poland issued the largest number of first work permits to nationals of Armenia, Azerbaijan, Belarus, Georgia, Moldova, Ukraine, Kazakhstan, and Turkmenistan. By the end of the year, Poland also hosted the largest stock of labour migrants from Armenia, Azerbaijan, Belarus, Georgia, Ukraine, Kazakhstan, Turkmenistan, Uzbekistan.

111 The Ministry of Internal Affairs of Russia, 'Analytical report on the results of the activities of the migration departments of the territorial bodies of the Ministry of Internal Affairs of Russia for January - October 2024', https://мвд.рф/dejatelnost/statistics/migracionnaya/item/57172708/, accessed on 27 February 2025.

migration authorities in Central Asia noted increased returns of their nationals and fewer departures for work to Russia.[112] Media reports in the first two quarters of 2024 have also been reporting fewer job seekers from Tajikistan and Uzbekistan.[113] These indicators suggest a potential decline in the number of Central Asia labour migrants in Russia, however, Russian data does not fully corroborate this assumption, with Tajikistan representing one notable exception. In 2024, citizens of Uzbekistan, Tajikistan, and Kyrgyzstan continued to account for the vast majority of foreign workers entering Russia. They represented nearly 84% of all border crossings performed by foreigners who cited work as their primary reason for entering Russia, surpassing four million entries. This marks a steady increase from previous years: 2.2 million in 2021, three million in 2022, and 3.9 million in 2023.[114] The number of border crossings by Kyrgyz and Uzbek nationals increased by 7% and 8.6% in 2024, compared to the previous year, reaching 772,522 and 2,183,343, respectively. By contrast, crossings by Tajik nationals arriving for employment saw a 14% decrease, reaching 1,044,743 in 2024, confirming a break in the previous upward trend. The issuance of new labour patents (labour licences) in 2024 followed a similar pattern: Tajik workers received 679,641 patents, 8.7% fewer than in 2023 and 15.7% fewer than in 2021. Uzbek nationals, conversely, continued to receive more labour patents, increasing from 1,334,417 in 2023 to 1,348,648 in 2024.[115]

112 The Ministry of Labor, Migration and Employment of the Republic of Tajikistan, 'On the results of the activities of the Ministry of Labor, Migration and Employment of the Republic of Tajikistan for the first half of 2024', https://www.mehnat.tj/ru/news/dt/27992682-25a6-4248-93c1-563ec790053b https://24.kg/obschestvo/315781_chislo_migrantov_izkyirgyizstana_vrossii_sokratilos_vdvoe/amp/, accessed on 27 February 2025.

113 Carnegie Endowment, 'Why Are Central Asian Migrant Workers Spurning Russia?', August 20224, https://carnegieendowment.org/russia-eurasia/politika/2024/07/russia-central-asia-migrants?lang=en, accessed on 27 February 2025.

114 Russia's State Statistics, 'Entry of foreign citizens into the Russian Federation', https://fedstat.ru/indicator/38479, accessed on 27 February 2025.

115 Russia's State Statistics, 'The number of foreign labour force, patents', https://fedstat.ru/indicator/58169, accessed on 27 February 2025.

According to the Eurasian Economic Union Commission, labour migration from Kyrgyzstan remained relatively stable, with 623,000 Kyrgyz workers recorded in 2024 – slightly above 2023 levels but significantly higher than in 2022.[116]

The data on remittances shows that Kyrgyzstan, Uzbekistan and Tajikistan[117] recorded higher money inflows from Russia in 2024,[118] which can imply sustained volumes of labour migration,[119] but also increased wage levels,[120] which curtailed the weaker performance of the rouble. Moreover, there are some examples when large-scale return migration is accompanied by increases in remittances, as returnees bring their savings with them, while migrants who stay on during episodes of large-scale returns remit more.[121]

This dispersed data offers contradictory signals and allows only for the tentative conclusion that the overall number of migrant workers in Russia may not have significantly decreased but remained within past years' estimates, amounting to around three million workers at any given moment.

116 Eurasian Economic Commission, 'Information on the number of citizens of the member states of the Eurasian Economic Union who entered the country (Republic of Armenia, Republic of Belarus, Republic of Kazakhstan, Kyrgyz Republic, Russian Federation) to carry out labor activities', https://eec.eaeunion.org/comission/department/migration/statistical_data.php, accessed on 27 February 2025.

117 National Bank of Tajikistan, 'Development of the infrastructure of the payment system of the National Bank of Tajikistan', https://nbt.tj/ru/payment_system/rushdi-infrasokhtori-nizomi-pardokhtii-bmt.php, accessed on 27 February 2025.

118 National Bank of the Kyrgyz Republic, 'Cross-border money transfers of individuals', https://www.nbkr.kg/index1.jsp?item=1785&lang=RUS, accessed on 27 February 2025.

119 UZ Daily, 'Central Bank: Uzbekistan received $14.8 billion in money transfers', January 2025, https://www.uzdaily.uz/ru/tsb-uzbekistan-poluchil-denezhnye-perevody-na-148-mlrd/; Anhor, 'The volume of money transfers from Russia to Uzbekistan increased by 29% in 2024', January 2025, https://anhor.uz/news/uzbekistan-206/, accessed on 27 February 2025.

120 Radio Azattyk, 'The number of Kyrgyz in Russia has decreased, but the volume of money transfers to the Kyrgyz Republic has increased', January 2025, https://rus.azattyk.org/amp/33295031.html, accessed on 27 February 2025.

121 Dilip, R., '2025: Will remittances decrease? Will it be the year of diaspora bonds?', World Bank Blog, December 2024, https://blogs.worldbank.org/en/peoplemove/2025--will-remittances-decrease--will-it-be-the-year-of-diaspora, accessed on 7 March 2025.

Growing disincentives, however, are likely prompting more Central Asians if not to reconsider migration to Russia, than to come for shorter periods. This assumption aligns, for example, with IOM's mobility reports in Kyrgyzstan,[122] which captures both increased levels of outward and return migration to and from Russia.

122 IOM Kyrgyzstan, 'Baseline Mobility Assessment', Round 4, October 2024, https://kyrgyzstan.iom.int/sites/g/files/tmzbdl1321/files/documents/2025-01/bma-r4_october-2024_rus.pdf; IOM Kyrgyzstan, 'Baseline Mobility Assessment', Round 3, April 2024 https://kyrgyzstan.iom.int/sites/g/files/tmzbdl1321/files/documents/2024-11/kyr_bma_round3_-rus.pdf, accessed on 7 March 2025.

Irregular migration and return

In 2024, the number of illegal border crossings at the EU's external borders decreased by 38% compared to 2023, reaching the lowest level since 2021.[123] Among EECA nationals, Ukrainians were the most frequently reported nationality with over 13,000 illegal border crossings, accounting for 6% of the total volume in January-November 2024.[124] The borders with Ukraine and Belarus – the so-called Eastern Border routes – were used by different third-country nationals attempting to cross irregularly, most notably Ukrainians, Ethiopians, and Somalis.[125] The presence of the latter two nationality groups may suggest the continued instrumentalisation of migration by Belarus and/or Russia.

In 2023, Ukrainians, Moldovans, Russians, and Georgians were the top four EECA nationalities **refused entry to the EU**. However, compared to 2022, fewer Ukrainians, Russians, and Georgians were refused entry in 2023, while refusals to Moldovan nationals increased by 27%. Moreover, EECA nationals accounted for 38% of all EU entry refusals in 2023, representing a 9% decrease from the previous year.[126]

The number of EECA nationals **found to be illegally present** in EU Member States increased slightly by 4% in 2023 compared to 2022. This increase affected most countries of the region, but was particularly pronounced for Kazakhstan, Turkmenistan, Uzbekistan, Kyrgyzstan, and Belarus, each experiencing growth of over 50% (see Table 6). For the third consecutive year, Ukrainians, Moldovans, and Georgians remained the top three EECA

123 FRONTEX Publications, '2024 in Brief', https://www.frontex.europa.eu/publications/2024-in-brief-PEEHJe, accessed on 7 March 2025.
124 FRONTEX, 'Annual Brief 2024', https://www.frontex.europa.eu/assets/Publications/General/Annual_Brief_2024.pdf, accessed on 7 March 2025.
125 FRONTEX, 'Irregular border crossings into EU drop sharply in 2024', January 2025, https://www.frontex.europa.eu/media-centre/news/news-release/irregular-border-crossings-into-eu-drop-sharply-in-2024-oqpweX, accessed on 7 March 2025.
126 EUROSTAT database, 'Enforcement of immigration legislation, Third country nationals refused entry at the external borders – annual data rounded', https://ec.europa.eu/eurostat/databrowser/view/migr_eirfs__custom_15595247/default/table?lang=en, accessed on 26 February 2024.

nationalities most frequently detected as staying irregularly in the EU. However, the number of Moldovans (down 12%) and Ukrainians (down 6%) decreased in 2023 compared to 2022. In terms of enforcement, Germany recorded the highest number of apprehensions of illegally present EECA nationals within the EU in 2023. Hungary apprehended the most Moldovan and Ukrainian nationals, Poland recorded the highest number of illegally staying Belarusian nationals, and Lithuania apprehended the most Kyrgyz nationals.

Table 6. Citizens of the EECA countries found illegally present in the EU[127]

EECA country	2021	2022	2023	EU MS with most apprehensions in 2023
Armenia	1,230	2,025	2,295	Germany
Azerbaijan	760	1,660	2,225	Germany
Belarus	1,650	2,820	4,325	Poland
Georgia	11,480	21,570	24,840	Germany
Kazakhstan	700	1,240	2,035	Germany
Kyrgyzstan	350	645	995	Lithuania
Moldova	40,870	45,750	40,205	Hungary
Russia	4,410	10,000	14,900	Germany
Tajikistan	500	1,335	1,380	Germany
Turkmenistan	70	490	795	Germany
Ukraine	36,305	43,220	40,735	Hungary
Uzbekistan	1,110	2,145	3,425	Germany
TOTAL	**99,435**	**132,900**	**138,155**	

127 EUROSTAT database, 'Enforcement of immigration legislation, Third country nationals found to be illegally present, rounded annual data', https://ec.europa.eu/eurostat/databrowser/view/migr_eipre__custom_15580568/default/table?lang=en, accessed on 27 February 2024.

In 2023, a total of 59,605 EECA nationals were **ordered to leave** the EU, representing a 19% increase compared to 2022. The majority of these orders were issued to Moldovan, Georgian, and Ukrainian nationals.[128] In terms of actual returns, Georgians and Moldovans were among the top EECA nationalities **returned following an order to leave** in 2023–2024,[129] with Georgia topping the list in both years.[130] In 2023, the highest number of Georgian nationals were returned from Poland, while Germany led in returns of Moldovans. The seventh Report of the European Commission on the Visa Suspension Mechanism indicates that Georgia and Moldova both demonstrated strong cooperation with EU Member States and FRONTEX on readmission and return. This includes coordinated return operations and joint training sessions, contributing to the overall efficiency of the process.[131]

Beyond the above-mentioned EECA nationals, the number of Tajik and Belarusian nationals returned from the EU increased by more than 70% in 2023 compared to 2022. According to the 2024 preliminary data, this trend was expected to continue through the end of the year.[132]

As in previous years, return rates (ratio of return orders to executed returns) to the EECA region from Europe remained comparatively high, on average approaching 53% in 2023 compared to the approx. 19% overall return rate for all third country nationals under obligation to leave the territory of the EU.

128 EUROSTAT database, 'Enforcement of immigration legislation, Third country nationals ordered to leave – annual data rounded', https://ec.europa.eu/eurostat/databrowser/view/migr_eiord__custom_15581643/default/table?lang=en, accessed on 27 February 2024.

129 The 2024 data is incomplete for the last quarter at the time of writing.

130 EUROSTAT database, 'Enforcement of immigration legislation, Third country nationals returned following the order to leave, quarterly data', https://ec.europa.eu/eurostat/databrowser/view/migr_eirtn1__custom_15598808/default/table?lang=en, accessed on 27 February 2024.

131 Report from the Commission to the European Parliament and the Council, 'Seventh Report under the Visa Suspension Mechanism', 6 December 2024, https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM%3A2024%3A571%3AFIN, accessed on 27 February 2024.

132 EUROSTAT database, 'Enforcement of immigration legislation, Third country nationals returned following the order to leave, quarterly data', https://ec.europa.eu/eurostat/databrowser/view/migr_eirtn1__custom_15598808/default/table?lang=en, accessed on 27 February 2024.

Notably, despite Belarus unilaterally suspending its readmission agreement with the EU in December 2021, the return rate to this country continued to increase.[133]

133 EU Monitor, 'Decision 2021/1940 - Partial suspension of the application of the Agreement with Belarus on the facilitation of the issuance of visas', https://www.eumonitor.eu/9353000/1/j4n-vk6yhcbpeywk_j9vvik7m1c3gyxp/vluymobapwbk, accessed on 7 March 2025.

Migration policy developments

Migration policy developments

This section offers an overview of the developments regarding the EU accession prospectives of Ukraine, Moldova, and Georgia. While all three countries formally received candidate status in 2023, their accession negotiations' paths vary. This section also explores deepening cooperation between the EU and Armenia, particularly in the area of visa liberalisation. Additionally, it delves into the changing migration policy landscape of Russia.

Path to EU Membership: Perspectives for Ukraine, Moldova, and Georgia

The year 2023 marked an important milestone for Ukraine, Moldova, and Georgia in the path toward EU approximation, as all three countries received EU candidate status. **Moldova and Ukraine** demonstrated strong commitment to reforms, despite the ongoing war in Ukraine and severe economic, humanitarian, and energy crises in Moldova. In June 2024, the first intergovernmental conference for both countries took place, officially launching accession negotiations and initiating the screening process.[134]

In its 2024 Enlargement Report for **Ukraine**, the European Commission outlines key areas requiring further progress, particularly legislative harmonisation on asylum procedures, border management, and anti-trafficking measures.[135] While Ukraine's legal framework in the field of legal and irregular migration, as well as visa policy, is largely aligned with the EU standards, further advancements will depend on the effective implementation of the aforementioned reforms. Additionally, comprehensive capacity-building

---

134 European Commission, 'Enlargement reports 2024: Commission outlines progress and priorities for candidate countries', October 2024, https://commission.europa.eu/news/enlargement-reports-2024-commission-outlines-progress-and-priorities-candidate-countries-2024-10-30_en, accessed on 7 March 2025.

135 European Commission, 'Enlargement Report for Ukraine', October 2024, https://enlargement.ec.europa.eu/ukraine-report-2024_en, accessed on 7 March 2025.

measures and strong inter-agency cooperation will be instrumental to ensuring a successful integration process. The next anticipated step for Ukraine is opening the so-called 'Fundamentals cluster', which covers judiciary and fundamental rights, justice, freedom and security, public procurement, and other critical chapters. To support this process, Ukraine is actively developing three strategic roadmaps on the rule of law, public administration reform, and the functioning of democratic institutions. These documents define the key reforms and transformations required within the negotiation framework with the EU. Specifically concerning migration issues, the Roadmap on Rule of Law plays a crucial role, as its successful implementation will be decisive in opening the Fundamentals cluster and ensuring effective reform monitoring.

Similarly, in 2024, the European Commission issued the Enlargement Report for **Moldova**,[136] which concluded that the management of legal and irregular migration is satisfactory. The report highlighted progress in implementing the national programme for managing migration flows, asylum, and the integration of foreigners, as well as the establishment and implementation of the temporary protection framework for displaced Ukrainians. However, it also pointed out areas requiring further improvement, particularly in the implementation of asylum and visa policies. Moreover, Moldova's legislative framework governing the management of external borders is thus far only moderately aligned with the EU acquis and requires further adjustments.

In January 2025, Ukraine and Moldova sent their first screening reports to the European Council, focusing on Cluster 1: Fundamentals.[137] This cluster is the first to open in accession negotiations and the last to close.

136 European Commission, 'Enlargement Report for Moldova', October 2024, https://enlargement.ec.europa.eu/moldova-report-2024_en, accessed on 7 March 2025.
137 European Council, 'Working Party on Enlargement and Countries Negotiating Accession to the EU', 17 January 2025, https://www.consilium.europa.eu/en/meetings/mpo/2025/1/working-party-on-enlargement-and-countries-negotiating-accession-to-the-eu-(350297)/, accessed on 7 March 2025.

Progress within this cluster will ultimately determine the overall pace of negotiations between the EU and each candidate country.[138]

In parallel, the EU has established the **Ukraine Facility**, a dedicated financial instrument providing up to €50 billion in support to Ukraine from 2024 to 2027. The Facility aims to assist Ukraine's recovery, reconstruction, and modernisation efforts, while also supporting the implementation of key reforms on the way to EU accession.[139] By facilitating structural transformations and sectoral alignment, the Ukraine Facility plays an essential role in advancing Ukraine's EU integration aspirations. In October 2024, the EU adopted the **Growth Plan for the Republic of Moldova**, a financial instrument worth €1.8 billion, underpinned by the Reform and Growth Facility for the period 2025-2027. The Plan – the largest EU financial support package for Moldova – aims to boost the country's economy, accelerate reforms, and bring Moldova closer to EU membership by providing significant financial assistance.[140]

Georgia's progress toward EU membership encountered significant challenges in 2024. In March 2024, the government adopted the 2024 Action Plan for Georgia's EU Integration, aimed at supporting implementation of commitments under the Association Agreement, including migration and asylum policy and integrated border management.[141] In October 2024, the European Commission's Enlargement Report for Georgia[142] reiterated serious concerns

138 European Commission, 'EU accession process Step by Step', October 2022, https://enlargement.ec.europa.eu/system/files/2022-10/eu_accession_process_clusters%20%28oct%202022%29.pdf, accessed on 7 March 2025.
139 European Commission, 'The Ukraine Facility, Supporting Ukraine's recovery, reconstruction, and path towards EU accession', https://commission.europa.eu/topics/eu-solidarity-ukraine/eu-assistance-ukraine/ukraine-facility_en, accessed on 7 March 2025.
140 European Commission, 'Moldova 2024 Enlargement Package Factsheet', https://enlargement.ec.europa.eu/moldova-2024-enlargement-package-factsheet_en, accessed on 7 March 2025.
141 Government of Georgia, Commission for Georgia's EU Integration convenes, approves 2024 Action Plan for Georgia's EU Integration, https://www.gov.ge/index.php?lang_id=ENG&sec_id=603&info_id=87954, accessed on 7 March 2025.
142 European Commission, 'Engagement Report for Georgia', October 2024, https://enlargement.ec.europa.eu/georgia-report-2024_en, accessed on 7 March 2025.

regarding the Georgian government's adoption of the Law on transparency of foreign influence, which represented a setback in meeting the EC's recommendations for candidate status. Moreover, the actions taken by the Georgian government were deemed inconsistent with the values and principles upon which the EU is founded, prompting the European Council to effectively halt the accession process. The controversial law, adopted in Georgia in May 2024, regulates the activities of non-governmental organisations and media entities that receive over 20% of their funding from foreign sources and engage in political activities, imposing additional reporting and labelling requirements. The law faced widespread criticism from civil society and international partners, who viewed it as an attempt to restrict freedoms and stigmatise the work of civil society organisations.[143]

In October 2024, Georgia held its first-ever fully proportional parliamentary elections, introducing a 5% electoral threshold, and, for the first time, applying electronic voting procedures. The Georgian Dream party remained in power amid allegations of voter fraud and irregularities. Opposition parties disputed the results, calling the elections neither free nor fair. A European Parliament's non-binding resolution criticized the elections and called for a repeat vote within a year.[144] Following these events, in November 2024, the Georgian Prime Minister announced the suspension of EU membership discussions until 2028, stating that the government would refuse any EU financial support for implementing the Association Agreement, claiming the agreement would still be implemented using national resources.

143 OCSE, 'Georgia's "transparency of foreign influence" law incompatible with democratic standards and human rights law: international human rights office ODIHR', May 2024, https://www.osce.org/odihr/569925, accessed on 7 March 2025.

144 European Parliament, 'Parliament calls for new elections in Georgia', November 2024, https://www.europarl.europa.eu/news/en/press-room/20241121IPR25549/parliament-calls-for-new-elections-in-georgia, accessed on 7 March 2025.

The decision to suspend EU accession negotiations, combined with the disputed election results, sparked widespread protests across Georgia, with demonstrators voicing concerns over democratic backsliding and the country's retreat from European integration.[145]

In response to the Georgian government's actions, which contradicted its commitments under the EU Integration process, the Council decided on 27 January 2025 to suspend parts of the EU-Georgia visa facilitation agreement. The suspension specifically affects diplomats and officials, who may now be required to apply for a visa when traveling to the EU. However, Georgian nationals holding ordinary passports will remain unaffected by this decision. At the same time, the Council reaffirmed the EU's commitment to supporting the Georgian people on their European path.[146]

Prospects for EU-Armenia Visa Liberalisation Dialogue

Armenia's talks with the EU on visa liberalisation for Armenian citizens intensified during 2024. The dialogue reflects Armenia's efforts to strengthen ties with Europe, seeking to distance itself from Russia's influence and align more closely with Western policies in the wake of Nagorno-Karabakh's dissolution. In July 2024, the Foreign Affairs Council welcomed 'the intention of the Commission to launch a visa liberalisation dialogue with Armenia'.[147]

145 Civil Georgia, 'Liveblog: Resistance | Protesters Celebrate New Year Arrival at Rustaveli Avenue', December 2024, https://civil.ge/archives/638926, accessed on 7 March 2025.

146 European Council, 'Georgia: Council suspends visa-free travel for diplomats and officials', January 2025, https://www.consilium.europa.eu/en/press/press-releases/2025/01/27/georgia-council-suspends-visa-free-travel-for-diplomats-and-officials/#:~:text=Today%2C%20the%20Council%20decided%20to,core%20principles%20of%20EU%20integration, accessed on 7 March 2025.

147 Commission launches a dialogue on visa liberalisation with Armenia', https://neighbourhood-enlargement.ec.europa.eu/news/commission-launches-dialogue-visa-liberalisation-armenia-2024-07-23_en, accessed on 6 March 2025.

Following this, in September 2024, the EC and Armenia officially announced the start of the visa liberalisation dialogue.[148]

The launch of the EU-Armenia visa liberalisation dialogue represents a significant shift in the future mobility of Armenian citizens and opens doors for new initiatives to deepen cooperation under the EU's Eastern Partnership framework. The dialogue will lead to reforms in key areas, including travel document security, border management, migration and asylum policies, public order, external relations, and fundamental rights. The EC will rigorously monitor Armenia's progress in these areas, working closely with the European Parliament and the Council. The dialogue will be conducted under a Visa Liberalisation Action Plan (VLAP), which, after discussion in the Council, will be presented to Armenian authorities. Visa liberalisation will be granted only once the dialogue is successfully completed and Armenia meets all VLAP conditions. Upon successful completion, Armenian citizens will benefit from easier and more affordable short-term travel (up to 90 days within a 180-day period) to the EU. Since 1 January 2024, Armenian citizens have already benefitted from a visa facilitation agreement with the EU.

On 11 December 2024, the operational phase of the EU-Armenia Visa Liberalisation Dialogue was launched in Yerevan. Both sides exchanged views on key reforms needed for visa-free travel. Senior officials agreed that the next steps in the visa liberalisation progress will include two scoping visits early in 2025, allowing EU experts and Member State representatives to conduct a gap analysis. The results of these missions will help establish the list of conditions for achieving visa-free travel for Armenian citizens.[149]

148 'EU and Armenia Launch Visa Liberalisation Dialogue', https://ec.europa.eu/commission/presscorner/detail/en/ip_24_4610, accessed on 7 March 2025.
149 'Operational phase of EU-Armenia Visa Liberalisation Dialogue launched in Yerevan', https://euneighbourseast.eu/news/latest-news/operational-phase-of-eu-armenia-visa-liberalisation-dialogue-launched-in-yerevan/, accessed on 3 February 2025.

Meanwhile, Armenia has been pursuing legal initiatives to demonstrate its commitment to European integration at the national level, such as the development of a draft law on launching Armenia's EU accession process, which was endorsed by the Government in January 2025 and is currently being debated in Parliament.[150]

Overall, while Armenia's European integration efforts have faced challenges and are likely to continue facing obstacles in the future (particularly due to its complex geopolitical situation), the country has shown a strong commitment to engaging with the EU across various sectors, from economic cooperation to political reform. However, maintaining ties with both the EU and Russia will remain a delicate balancing act for Armenia.

Russia tightening controls on irregular migration in times of growing labour force shortages

In early March 2025, Russian authorities placed 685,000 foreign nationals on the newly created 'registry of controlled persons',[151] a watchlist tracking foreigners deemed to lack legal grounds to stay in Russia. This registry is one of the many consequences of the 2024 legal amendments, which have significantly tightened Russia's immigration policies, making the crackdown on irregular migrants a top priority. Foreigners can end up on this registry for various reasons, including overstaying visas or residence permits, illegally crossing the border, being readmitted without legal grounds, having documents annulled, being denied or stripped of asylum, refugee, or citizenship status, receiving an expulsion order or entry ban, being convicted of a crime, or overstaying as a cruise passenger. Meanwhile, inclusion on the list brings severe restrictions: affected individuals are banned from driving, marrying,

150 The Parliament of Armenia, http://www.parliament.am/news.php?cat_id=2&NewsID=21730&year=2025&month=02&day=12&lang=eng, accessed on 3 February 2025.
151 Interfax, '685 thousand foreigners are included in the registry of controlled persons in the Russian Federation', 9 March 2025, https://www.interfax.ru/russia/1012685, accessed on 12 March 2025.

and traveling within Russia. They also cannot open bank accounts, spend more than 30,000 roubles ($351) per month, or transfer money abroad, effectively cutting off remittances to their home countries.[152] This registry is part of Russia's new expulsion regime, introduced through amendments to the law 'On the legal status of foreign citizens in the Russian Federation',[153] which has made expelling foreign nationals significantly easier and faster. Previously, deportation required a court order and could take up to 90 days. Under the new amendments, authorities can expel individuals in as little as 48 hours. Migrant advocates have warned that this pace is unrealistic and endangers migrants' rights, given that verifying a person's nationality for repatriation often takes months.[154] Parents of teenage migrants who commit crimes will also face deportation.[155] Additionally, police have gained discretionary powers to add foreign nationals to the controlled persons registry,[156] making deportation an increasingly flexible enforcement tool.

The wave of legal amendments – with as many as 14 new ones adopted in 2024[157] – followed the March 2024 terrorist attack near Moscow, which was carried out by the Islamist organisation ISIS-K, with 15 Tajik nationals arrested as ostensible perpetrators.[158] The attack triggered an outcry in Russia, prompting sweeping police raids on migrant communities. In 2024, Russia forcibly deported over 80,000 foreigners, nearly twice the number of the previous year.[159] Thousands of Central Asians have been caught in mass deportation raids, with 17,000 Tajik citizens expelled in just the first half of 2024, and Kyrgyz officials reporting a twofold increase in deportations of their nationals.[160] Recent reports from detention centres in Russia highlight the harsh treatment of migrants awaiting deportation,[161] who are targeted by these new measures. Intensified police raids, however, are not an entirely new phenomenon. The Russian Interior Ministry has long used summary arrests to demonstrate decisive action to the public and political leadership in response to security incidents.[162]

Beyond deportation measures, Russia has introduced additional restrictions on foreign nationals. The maximum temporary stay for foreigners from visa-free countries without residence permits has been reduced to 90 days per year, instead of the previous 90 days within a 180-day period. Foreigners married to Russian citizens can now obtain a temporary residence permit through a simplified procedure only if they have been married for at least three years.[163] Organisers of irregular migration will face harsh penalties,

152 Garant, 'Migrants will be registered: how they will tighten control over visitors in Russia', September 2024, https://www.garant.ru/article/1753211/, accessed on 12 March 2025.
153 Federal Law of 25 July, 2002 N 115-FZ 'On the legal status of foreign citizens in the Russian Federation' (with amendments and additions), https://base.garant.ru/184755/, accessed on 12 March 2025.
154 The Moscow Times, 'Russia's New Migration Regulations "Very Dangerous" For Millions of Foreign Laborers, Activists Warn', 5 February 2025, https://www.themoscowtimes.com/2025/02/05/russias-new-migration-regulations-very-dangerous-for-millions-of-foreign-laborers-a86344, accessed on 12 March 2025.
155 Parliament Newspaper, 'Parents of underage migrant offenders will be punished with deportation', December 2024, https://www.pnp.ru/politics/roditeley-nesovershennoletnikh-migrantov-narushiteley-nakazhut-deportaciey.html, accessed on 12 March 2025.
156 Garant, 'From February 5, police will be able to expel migrant offenders from Russia', January 2025, https://www.garant.ru/news/1778741/, accessed on 12 March 2025.
157 State Duma of the Federal Assembly of the Russian Federation, 'Vyacheslav Volodin: The State Duma is preparing initiatives related to medical examination of foreign citizens arriving in the Russian Federation', February 2025, http://duma.gov.ru/news/60850/, accessed on 12 March 2025

158 Sahadeo J. & Morrison, N. (2025), 'Russian Migration Policy at the Crossroads: Trends and Regional Repercussions', Prague Process Policy Brief, https://www.pragueprocess.eu/en/resources/repository/34-briefs/507-russian-migration-policy-at-the-crossroads-trends-and-regional-repercussions, accessed on 6 March 2025.
159 Tass, 'More than 80 thousand migrants were forcibly expelled from Russia in 2024', January 2025, https://tass.ru/obschestvo/22835373, accessed on 12 March 2025.
160 Radio Free Europe, 'Central Asia in Focus: Central Asians Face Detention and Deportation in Russia', August 2024, https://about.rferl.org/article/central-asia-in-focus-central-asians-face-detention-and-deportation-in-russia/, accessed on 12 March 2025.
161 . Foreign Policy Research Institute, 'Central Asian Migrants Face Harsh Treatment at Moscow's Sakharovo Detention Center', February 2025, https://www.fpri.org/article/2025/02/central-asian-migrants-at-sakharovo-detention-center/, accessed on 12 March 2025.
162 Russia.Post, 'What is Behind the Kremlin's Increasingly Anti-Migration Line?', August 2024, https://russiapost.info/politics/anti_migration_line, accessed on 12 March 2025.
163 Garant, 'Migrants will be registered: how they will tighten control over visitors in Russia', September 2024, https://www.garant.ru/article/1753211/, accessed on 12 March 2025.

including prison sentences and heavy fines, following new legislation passed by the Russian State Duma in October 2024.[164] Meanwhile, migrant children are now barred from attending schools unless they can demonstrate proficiency in the Russian language.[165]

These measures, combined with heightened police scrutiny and an increasingly unwelcoming environment, have led many migrants to question their future in Russia. Surveys conducted between November 2024 and January 2025 indicate that 61.5% of Kyrgyz and 35% of Uzbek respondents believe that working in Russia will soon become impossible.[166] The perception of diminishing opportunities aligns with a broader economic paradox. By the end of 2023, Russia's unemployment rate had already fallen to 3%,[167] and in 2024, the labour market tightened further, with the unemployment rate reaching yet another historic low of 2.3% by year-end.[168] Persistent labour shortages stem from a combination of long-term demographic decline, a surge in emigration recorded in 2022, military conscription, the reallocation of workers to defence-related industries,[169] and declining immigration. Labour and skill shortages – conservatively estimated at 1,5 million workers[170] – are widely recognised as the economy's Achilles heel. Both Western[171] and Russian analysts[172] warn that this structural weakness may impede Russia's economic growth in the years ahead,[173] at least until larger working-age cohorts enter the labour market in the early-to-mid-2030s.[174] Against this backdrop, increasingly restrictive migration policies clash with economic needs and a high demand for a migrant labour force, but these shifts in migration policy cannot be separated from Russia's internal politics. The immigration system in Russia has been described as reactive and volatile, with frequent legal changes affecting both migrants and Russian citizens. Since the dissolution of Russia's Federal Migration Service in 2016, migration policy has increasingly been driven by security concerns. This trend has intensified in the wake of Russia's invasion of Ukraine and is unlikely to reverse in 2025, as migration, once a largely economic matter, is now deeply entangled with domestic politics, security, and strategic realignments.

The full implications of recent policy changes, as well as numerous additional measures proposed by the Russian State Duma in early 2025, will continue to unfold. However, current developments suggest that the era of easy, circular migration between Central Asia and Russia is giving way to a more restrictive, unstable, and fragmented migration landscape. Notably, these changes may have particularly negative consequences for Central Asian migrants, especially those from Tajikistan. Compared to Uzbekistan and Kyrgyzstan, Tajikistan has the least diversified portfolio of labour migration destinations.

164 Confidence Group, 'Law on toughening penalties for organizing illegal migration adopted', October 2024, https://eng.confidencegroup.ru/info/news/zakon-ob-uzhestochenii-nakazaniya-za-organizatsiyu-nezakonnoy-migratsii-prinyat/?sphrase_id=7379, accessed on 12 March 2025.
165 Re:Russia, 'Migration-Occupation Balance: The Kremlin motives behind limiting the inflow of migrants', January 2025, https://re-russia.net/en/analytics/0231/, accessed on 12 March 2025.
166 24.KG, 'Kyrgyz believe that it will become impossible for migrants to work in Russia', January 2025, https://24.kg/obschestvo/317734_kyirgyizstantsyi_schitayut_chto_rabotat_migrantam_vrossii_stanet_nevozmojno/, accessed on 12 March 2025/
167 ICMPD, 'ICMPD EECA Outlook 2024', accessed on 28 February 2025.
168 Interfax, 'Mishustin reported that unemployment in the country remains at 2.3', https://www.interfax.ru/business/1006881, accessed on 28 February 2025.
169 Le Monde diplomatique, 'Russia struggles to fill jobs', https://mondediplo.com/2025/02/07russia, accessed on 28 February 2025.
170 Vedomosti, 'In 2025, 76% of Russian companies plan to actively recruit employees', 7 January 2025, https://www.vedomosti.ru/management/articles/2025/01/09/1085156-kompanii-planiruyut-aktivno-nabirat-sotrudnikov, accessed on 28 February 2025.

171 GIS, Savic, B., 'Russia's labour shortage is a double-edged sword for growth', 20 December 2024, https://www.gisreportsonline.com/r/russias-labor-shortage/, accessed on 28 February 2025.
172 wiiw, 'The Russian Economy Amidst the War and Sanctions', Russia Monitor No. 1, January 2024, https://wiiw.ac.at/the-russian-economy-amidst-the-war-and-sanctions-p-6727.html, accessed 28 February 2025.
173 Ahapkin N., 'Structural dynamics of the Russian labour market: effects of sanctions restrictions', Bulletin of the Institute of Economics of the Russian Academy of Sciences 6/2024, 199-vart-2024-6-p7-23, accessed 28 February 2025.
174 Meduza, '"A perfect storm"' Russia is facing a severe labour shortage. Economists say it will only get worse in the coming years', December 2024, https://meduza.io/en/feature/2024/12/11/a-perfect-storm, accessed 28 February 2025.

If Russia deports large numbers of Tajik migrants or blocks their entry, Tajikistan could face rising unemployment, increased poverty, and potentially even social unrest.

Conclusions

Conclusions for 2024

Migration in the EECA region has become increasingly intertwined with geopolitical shifts and domestic challenges, as evidenced by the events of 2024. The protracted war in Ukraine has not only caused massive displacement but also cemented migration as a security and humanitarian priority across the region. The war's migratory impact has been enormous: a test of global solidarity that, while still ongoing, has seen both remarkable support and immense human tragedy. Regionally, Moldova has become a linchpin in managing the Ukraine refugee crisis. Its handling of such a massive influx with limited means has been praised as 'incredibly big heart from a small country". Every facet of migration – refugees, internal displacement, labour migration, demographic change – is in play in Ukraine's case, making it a crucial focus for understanding how conflict reshapes population movements in the 21st century. Looking ahead, when peace comes, both a massive return migration and the need to mobilise additional human resources for reconstruction through labour migration will be on the agenda. Planning for reconstruction and incentivising returns – potentially through housing grants, diaspora investment, and international cooperation – will be crucial. If the country successfully rebuilds, many of the forcibly displaced will likely return.

The resolution of the Nagorno-Karabakh conflict led to a sudden influx of displaced populations into Armenia, underlining how quickly dormant disputes can reshuffle mobility patterns. Armenia now faces a demographic and humanitarian challenge at home that will shape its development for years to come. Conversely, Azerbaijan has pivoted toward post-conflict reconstruction, launching a large-scale return program for its internally displaced persons. In the long run, if an Armenia-Azerbaijan peace deal is reached, it may open borders and create new migration and mobility opportunities in the South Caucasus, but this remains a very distant reality in early 2025.

The election results in Belarus, Georgia, and Moldova illustrate a spectrum of impacts on migration, reflecting the complex relationship between political developments and mobility trends. In Belarus, the 2025 presidential elections – far from democratic – secured another term for Lukashenka, further entrenching a climate that continues to push Belarusians out of the country. Since the 2020 protests, many have sought asylum in Poland, Lithuania, and other EU countries, with Belarusian asylum seekers recording the highest recognition rate among EECA nationals in 2023. By 2024, Belarus's growing international isolation also led to a rise in emigration under work and study permits, expanding a diaspora that could play a role in future democratic transitions. A clear example of diaspora influence comes from Moldova, where the referendum and elections underscored the powerful role of emigrants in shaping home-country policies. The fact that the diaspora's vote was decisive in securing Moldova's pro-EU constitutional amendment sends a broader regional message: emigrant communities can directly impact national trajectories. This may embolden other exiled groups to remain politically engaged in their homelands' future. At the same time, it highlights how origin countries may strategically court their diasporas. Moldova is likely to continue strengthening ties with expatriates, potentially offering economic incentives for returnees. In Georgia, the disputed 2024 parliamentary elections triggered protests but did not result in large-scale emigration. However, if Georgia's EU candidacy is jeopardized, the risk of increased outmigration – particularly among young, educated Georgians – may grow, reshaping the country's migration trends.

In Central Asia, traditional labour migration corridors – particularly to Russia – have been tested by economic volatility and tightening policies. Yet, these same challenges have prompted governments to adapt, whether by seeking new partnerships for labour migration or by formulating strategies to address outward migration in a more comprehensive manner. Throughout the region, migration is no longer viewed solely through an economic lens but also as a matter of security, demographic sustainability, and strategic importance.
As the region entered 2025, it faced an even more complex and uncertain migration landscape. Ongoing conflicts and economic disparities mean that large-scale displacement and labour outflows are set to continue without fundamental changes. At the same time, policy responses are evolving: European countries are deliberating the future of Temporary Protection for Ukrainians, Central Asian states are negotiating new labour mobility schemes and bolstering support for their diasporas, and countries like Moldova are innovating to counteract depopulation. The lessons of 2024 – the importance of resilience and integration for displaced communities – underscore that flexibility and forward planning will be crucial. While the drivers of migration in EECA remain strong, there are also nascent opportunities for more strategic governance of these movements.

International Centre for Migration Policy Development (ICMPD)
Rothschildplatz 4
1020 Vienna
Austria
www.icmpd.org

The findings, projections, and analyses presented in this report are based on the most recent data and trends available at the time of publication. However, migration dynamics are inherently complex and subject to a range of uncertainties and contingencies, including unforeseen political, economic, environmental, and social developments. As such, the views expressed in this report may not fully reflect future conditions or outcomes. Readers are encouraged to interpret the findings with an understanding of these inherent limitations.

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