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# **Migration Outlook 2026**

**Eastern Europe & Central Asia**

**Eight migration issues to look out for in 2026**

Origins, key events and priorities

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Origins, key events and priorities for Europe

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# Eight migration issues to look out for in 2026

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

## 1 The uncertain trajectory of displacement from Ukraine

Four years after Russia's full-scale invasion of Ukraine, the war has entered a protracted phase of high-intensity conflict with limited territorial change but continued large-scale humanitarian consequences. Around 5.8 million Ukrainians remain displaced abroad and more than 4.6 million are internally displaced, while return intentions appear to be gradually declining as displacement becomes more protracted. Displacement outcomes in 2026 will depend heavily on the trajectory of the war. The most plausible scenarios range from a continued war of attrition with stable displacement levels to a frozen conflict that could allow for partial returns. However, more extreme scenarios remain possible: a deterioration in the security situation could lead to renewed large-scale displacement, while a peace agreement could trigger the return of more than a million displaced Ukrainians. Until the strategic trajectory of the war becomes clearer, Europe must prepare for a wide range of migration outcomes.

## 2 The strategic dilemma of Ukrainian labour force in Europe

Over the course of the war, displaced Ukrainians have become increasingly integrated into European labour markets. Employment rates among beneficiaries of temporary protection have risen steadily in EU Member States, and Ukrainian workers now contribute to sectors

facing labour shortages. While temporary protection remains the primary legal framework governing their stay, several Member States have begun facilitating transitions to other residence statuses linked to employment, education, or long-term residence. Should the security situation in Ukraine improve, the question of return migration will become increasingly salient. Ukraine has a strong interest in encouraging the return of its citizens to support reconstruction and address the country's significant demographic and labour force losses resulting from displacement, occupation, and war-related mortality. At the same time, the departure of a large number of already integrated Ukrainian workers could pose challenges for European labour markets that have come to rely on their contributions. Addressing the interplay between Ukraine's reconstruction needs and Europe's labour demand will likely become an important policy question in 2026 and beyond.

### **3 Russia is developing one of the most digitalised migration control systems in the region**

Recent migration policy developments in Russia, which remains the principal destination for migrants from Central Asia, point to a broader shift toward security-oriented and digitalised migration governance. Authorities are expanding monitoring mechanisms, biometric systems, and digital platforms aimed at strengthening oversight of foreign citizens and reducing irregular stay. Key measures include the creation of a "registry of controlled persons", which by early 2026 reportedly contained around 840,000 individuals; the development of digital profiles of foreign citizens; the expansion of biometric registration; and digital pre-arrival procedures. Together, these tools are designed to integrate migration, border control, employment, and enforcement data into a unified information system. Experimental initiatives introduced in major urban areas further illustrate this shift. In the Moscow agglomeration, migrants participating in a pilot scheme are required to register through a mobile application, share real-time location data, and complete biometric enrolment, replacing traditional registration procedures. While digitalisation is becoming a common feature of migra-

tion management globally, the scale and integration of these systems suggest that digital monitoring will play an increasingly central role in Russia's migration governance model, reshaping how migration compliance and enforcement are managed in 2026 and the coming years. As a result, migration from Central Asia to Russia will become more tightly regulated and digitally monitored, potentially affecting both the scale and the modalities of labour mobility of this migration corridor.

### **4 Central Asia emerging as an important labour migration partner for Europe**

Labour migration remains a central economic pillar for Central Asian countries, particularly in Tajikistan and Kyrgyzstan, where remittances account for a substantial share of Gross Domestic Product (GDP). Russia is likely to remain the dominant destination for migrant workers in the near term due to long-established migration networks, geographic proximity, and language familiarity. However, labour migration corridors are increasingly diversifying. In particular, new labour mobility initiatives linking Uzbekistan, Kyrgyzstan and Tajikistan with European countries such as Germany and the Benelux states reflect growing efforts to expand regulated migration pathways beyond the traditional Russia corridor. These initiatives coincide with increasing labour shortages across European labour markets and a broader policy shift toward targeted recruitment and skills partnerships with selected partner countries. Although these emerging migration corridors remain modest in scale, they signal a strategic reconfiguration of regional labour migration patterns. In this context, Central Asia is increasingly emerging as a region of interest for selective labour recruitment by European countries, suggesting that migration links between the two regions may become more institutionalised in the coming years.

## 5 EECA workers are becoming structurally embedded in European labour markets

Labour migration from EECA countries to the European Union has expanded significantly over the past decade. By early 2025, more than 1.33 million valid employment-related residence permits were held by EECA nationals in the EU, representing nearly a quarter of all valid work permits issued to non-EU nationals. Ukrainians remain by far the largest group among employment permit holders, with over 770,000 valid work permits. A notable structural shift has also emerged in recent years. While the number of first-time work permits issued to EECA nationals has declined since the peak years of 2021-2022, the overall stock of EECA workers in the EU has continued to grow. This divergence suggests that labour mobility from the region is increasingly driven by retention dynamics – including permit renewals, longer stays, and status transitions – rather than by new inflows alone. These developments indicate that workers from Eastern Europe and Central Asia are becoming structurally embedded in European labour markets. As labour shortages persist across several EU economies and migration corridors diversify, EECA workers are likely to remain a stable and strategically important component of Europe’s labour supply in the years ahead.

## 6 Armenia navigating the long-term integration of displaced persons from Karabakh

Following the displacement of over 100,000 ethnic Armenians from Karabakh in 2023, Armenia has entered a new phase focused on their longer-term integration. The government increasingly emphasises naturalisation and the gradual transition from emergency assistance to self-sufficiency. However, reductions in temporary support schemes and limited housing and employment opportunities could encourage onward or circular mobility among parts of the displaced population. In 2026, the success of Armenia’s integration strategy will depend on the effectiveness of housing programmes, labour market access, and the broader economic outlook. Developments in the Armenia-Azerbaijan peace process will also remain an important factor shaping longer-term stability and migration prospects.

## 7 EECA region emerging as a potential transit corridor during regional crises

Developments in Iran in 2025 and early 2026 introduced a new migration dimension to the EECA region, raising the possibility of new displacement dynamics linked to the instability in the Middle East. Some cross-border movements have been observed across the EECA region, including through Armenia’s southern Meghri-Nordooz checkpoint and the Iran-Turkmenistan border, highlighting the role of EECA countries as accessible land exit routes from Iran. Although these movements have so far remained largely transit-oriented and limited in scale, they prompted contingency planning for a potential larger influx. Should regional instability involving Iran intensify, several EECA countries – including those in the South Caucasus and Central Asia – could face renewed episodic migration pressures or indirect effects linked to displacement and shifting migration routes in 2026.

## 8 The continued centrality – and vulnerability – of remittance-dependent economies

Remittances remain a critical pillar of economic stability across several EECA countries, particularly in Central Asia. Tajikistan continues to rank among the most remittance-dependent economies globally, with inflows estimated at around two-thirds of GDP, while Kyrgyzstan and Uzbekistan also rely heavily on transfers from migrant workers abroad. In 2025, remittance inflows increased further, supported by strong labour demand in Russia, rising wages, and favourable exchange rate dynamics. Despite their stabilising role, such high levels of dependence also expose sending countries to external shocks. Changes in migration policies, labour demand, or economic conditions in key destination countries could quickly translate into declining remittance flows with significant macroeconomic and social consequences. As migration corridors diversify and labour mobility patterns evolve, the resilience of remittance-dependent economies will remain an important factor shaping migration dynamics in the EECA region in 2026.

## 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 2025. It also provides a cautious outlook into areas and issues that may affect migration and mobility to, within, and from the region in 2026. In a non-exhaustive way, the publication addresses selected developments across 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 drawing on official statistics and publicly available data sources to ensure a grounded understanding of regional dynamics.

Migration developments in EECA continue to unfold within a broader global context marked by geopolitical instability, protracted conflicts, and uneven economic recovery. In recent years, violent conflict has remained the primary driver of displacement worldwide, while economic pressures, demographic imbalances, and labour market needs continue to shape patterns of international migration. At the same time, migration governance is undergoing significant change across many regions, as governments respond to growing political attention to migration and seek to balance mobility objectives with security considerations. Many destination countries are adjusting migration policies, introducing stricter asylum and border measures while also exploring more targeted and needs-based labour migration pathways to address structural labour shortages. These broader global dynamics are also reflected in the EECA region.

This Outlook is structured in three parts. The first section places selected country and sub-regional developments *in focus*, examining migration-related developments in Ukraine amid the ongoing war, Moldova’s continuing response to hosting displaced persons from Ukraine and its progress towards EU accession, as well as recent migration dynamics in Armenia, and Central Asia. The second section analyses broader regional migration trends, including economic developments and remittance patterns, forced displacement

and international protection, labour migration to the EU and Russia, as well as irregular migration and return in relation to the EU. The final section reviews Ukraine's progress in the EU accession process, including areas relevant to migration governance, and examines recent changes in Russia's migration policy framework.

The 2026 Outlook edition highlights a region where migration is increasingly shaped by long-duration crises and governance choices rather than short-term shocks alone. As displacement becomes more protracted, labour mobility corridors are reconfigured, and digital tools expand state control over movement, the balance between protection, inclusion, economic needs, and security priorities will define migration outcomes across EECA in the year ahead.

Focus regions

## | Focus regions

This section delves into the migration-related developments in Ukraine amid the ongoing war, and examines migration realities in Central Asia, Moldova, and Armenia.

### Ukraine

On 24 February 2022, four years after Russia's full-scale invasion of Ukraine, Europe continued to face its largest displacement crisis since the Second World War. As of early 2026, approximately 5.86 million<sup>1</sup> displaced Ukrainians remained abroad, including around 5.3 million in Europe, and over 4.6 million<sup>2</sup> were internally displaced. More than 4.35 million<sup>3</sup> were registered for temporary protection in EU Member States, with Germany, Poland, and Czechia hosting the largest numbers. At the same time, an estimated 4.53 million people<sup>4</sup> have returned to their homes since 2022, including some 1.17 million from abroad.

Ukraine's economy showed relative resilience in 2025, yet structural vulnerabilities persist. Growth remained constrained by sustained attacks on critical infrastructure, labour shortages, and reduced industrial capacity, with real GDP projected at 2.0% in 2025 and 4.5% in 2026, according to IMF<sup>5</sup> (World Bank estimates GDP in 2026 at 2%). Despite substantial international support (EUR 43.3 billion<sup>6</sup> from the EU between 2022 and 2026), GDP remains well below pre-2022 levels and recovery is uneven, particularly in frontline regions<sup>7</sup>. Elevated poverty and humanitarian needs – with over 10 million people<sup>8</sup> in need of humanitarian assistance – persist, while extensive damage to energy infrastructure continues to generate intermittent power shortages and disrupt industrial recovery. At the same time, the absence of large-scale outflows<sup>9</sup> from heavily affected regions reflects population resilience and constrained mobility options rather than improved security conditions.

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Entering 2026, the war remained a protracted, high-intensity conflict of attrition, with only limited territorial shifts despite sustained fighting along a roughly 1,200-kilometre frontline. Casualties between February 2022 and December 2025 were estimated at 500,000–600,000, including 100,000–140,000 killed, with combined Ukrainian and Russian casualties potentially approaching two million people by spring 2026<sup>10</sup>. Intensified hostilities in 2025 – marked by sustained airstrikes and attacks on Ukraine’s critical infrastructure – had further increased civilian casualties. Ukraine’s population has declined by around 8 million<sup>11</sup> since 2022, due to displacement, occupation, reduced birth rates and war-related mortality. Despite renewed diplomatic engagement in early 2026, structural constraints and incompatible strategic objectives on both sides continue to limit prospects for a comprehensive ceasefire<sup>12</sup>. As a result, both conflict resolution and the near-term large-scale return remain uncertain.

Recent surveys<sup>13</sup> indicate a gradual decline in return intentions among displaced Ukrainians as displacement becomes protracted and integration abroad deepens. While many retain strong ties to Ukraine, increasing labour market participation, education enrolment, and evolving security and economic conditions in Ukraine, together with host-country policies, are contributing to more differentiated mobility intentions – ranging from conditional return, and circular mobility to long-term stay abroad. Projections suggest that return dynamics will depend heavily on the evolution of the war, remaining minimal under a prolonged conflict but potentially increasing under a peace scenario. However, returns are likely to be uneven and geographically concentrated, often outside areas of origin, requiring targeted investments in housing, services, employment and administrative systems to ensure sustainable reintegration<sup>14</sup>.

In 2025, Ukraine further advanced the operationalisation of the work of the Ministry of Social Policy, Family and Unity, including efforts to expand outreach to displaced Ukrainians abroad. In this context, the Ministry cooperates with ICMPD, which has established Ukrainian Consultation Centres in the Czech Republic, Germany and Poland, currently being gradually transformed into ‘Unity Hubs’. The Unity Hub in Sweden is planned to open in summer 2026.

At the strategic level, 2025 marked continued progress in Ukraine’s path toward EU accession. Following the launch of accession negotiations in 2024, Ukraine completed screening meetings for several negotiating clusters, including those covering fundamental reforms, the internal market and external relations<sup>15</sup>. The country has demonstrated sustained commitment to legislative alignment despite the ongoing war<sup>16</sup>, supported by the EU-Ukraine Facility, which has accelerated reforms in areas such as energy, environmental policy and economic governance<sup>17</sup>. Progress has been noted in public administration reform, financial control and elements of migration and visa policy, although effective implementation remains a key challenge<sup>18</sup>.

Within the EU, temporary protection for people displaced from Ukraine remains in force until 4 March 2027, reaffirming the EU’s solidarity and maintaining the existing rights for beneficiaries across Member States. In September 2025, the EU Council adopted a recommendation encouraging Member States to facilitate the transition from temporary protection to national residence statuses (e.g., based on employment, study, family or other grounds), to allow applications for certain EU law-based statuses, provided that such statuses cannot be held simultaneously with temporary protection, and to ensure information provision to the beneficiaries of temporary protection, including through Unity Hubs.

As in the previous year, the trajectory of the war will be decisive in shaping migration-related outcomes in 2026. The two most plausible scenarios are a “long war”, involving a protracted war of attrition with rising human losses while Ukraine pursues reconstruction and deeper integration into Western political and security frameworks, and a “frozen conflict” following an armistice that stabilises current front lines and territorial changes, potentially paving the way for a peace agreement with or without resolving Ukraine’s military status and territorial issues. Two less likely, yet still possible, scenarios are a “Ukrainian victory”, pushing Russian forces back to at least the 23 February 2022 line, and a “Ukrainian defeat”, likely resulting in a change of government, demilitarisation, neutrality and the de facto partition of Ukrainian territory. The way in which these scenarios unfold could lead to markedly different outcomes in terms of displacement, migration and return.

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Estimates range from a potential return of 1.2 to 2.1 million Ukrainians in the event of an armistice or peace agreement, to the further displacement of more than 10 million people in the event of a full Russian occupation<sup>19</sup>. Should the war in Ukraine take a negative turn, European countries may once again face refugee arrivals on a very large scale. Until the trajectory of the war becomes clearer, none of these migration scenarios can be excluded.

### Moldova

The continued displacement from Ukraine remained a defining feature of Moldova's migration landscape in 2025. Despite its limited size and resources, the country continued to host one of the largest shares of displaced persons relative to population in Europe. By December 2025, UNHCR estimated that around 148,000 displaced persons from Ukraine remained in Moldova, representing roughly 6% of the country's population<sup>20</sup>. As international humanitarian assistance gradually declined, responsibility for protection and support increasingly shifted to national systems. In early 2026, the authorities extended Temporary Protection until 1 March 2027, with beneficiaries able to apply for the extension of their protection status through an online application platform which contributes to administrative efficiency and predictability for both beneficiaries and institutions<sup>21</sup>. Nevertheless, socio-economic vulnerability among temporary protection holders remains considerable, with women, children and older persons disproportionately represented. This underscores the need for sustained international support as longer-term inclusion measures are developed<sup>22</sup>.

These developments unfolded against the backdrop of Moldova's profound demographic challenges. The 2024 Population and Housing Census confirmed a resident population of approximately 2.4 million, compared to 2.7 million in 2014, and highlighted accelerating population ageing and continued outward migration<sup>23</sup>. These trends point to a steadily shrinking labour force and growing pressure on the country's economic and social systems. In this context, migration governance and the integration of foreign nationals are increasingly viewed as important instruments to mitigate labour shortages and support economic resilience. Reflecting this approach, the Government

adopted the National Programme for the Phased Integration of Foreigners (2025-2027), which establishes a more structured framework for the inclusion of beneficiaries of temporary protection and other foreign residents<sup>24</sup>. The programme foresees expanded access to healthcare, education, Romanian-language instruction, skills development, recognition of qualifications, and labour-market integration. At the same time, it acknowledges that a significant share of the planned measures will require continued external financing and technical assistance.

Progress on the European Union accession track provided an important political framework for these reforms. In September 2025, Moldova successfully completed the EU screening process, enabling the European Commission to signal readiness to open accession negotiations under Cluster 1 (Fundamentals), pending Member State approval<sup>25</sup>. The Commission's eighth Visa Suspension Mechanism report, released in December 2025, confirmed the continuation of visa-free travel for Moldovan citizens while identifying several areas requiring further attention, including closer alignment with EU visa policy, and efforts to reduce unfounded asylum applications in the EU<sup>26</sup>.

Developments in migration governance were also closely linked to broader reforms in border management and security. In 2025, Moldova consolidated the policy foundations for new programmes on Migration and Asylum<sup>27</sup> and on Integrated Border Management for 2026-2030<sup>28</sup>, developed in cooperation with EU institutions and specialised partners. The reform agenda emphasises strengthened inter-agency risk analysis, improved integrity and anti-corruption safeguards, and the continuation of Schengen self-assessment cycles, alongside efforts to ensure rights-compliant operational practices. Particular attention is given to addressing persistent risks related to smuggling and other cross-border activities along sensitive segments of the border<sup>29</sup>. Cooperation with Romania on coordinated border controls continued to deepen, improving operational coordination and throughput at key crossing points. However, further investments in procedures, staff capacities, and technological systems will be required to consolidate these improvements and ensure efficient and secure border and migration management<sup>30</sup>.

## Armenia

Following Azerbaijan's restoration of control over Karabakh in 2023, the region's ethnic Armenian population fled to Armenia within a short period. By the end of 2025, Armenia continued to host over 130,000 refugees from Azerbaijan<sup>31</sup>, most of whom arrived in the aftermath of 2023 events. While these individuals were formally granted temporary protection – extended until 31 December 2026<sup>32</sup> – policy has increasingly shifted from emergency response to managed integration, with naturalisation as a central pillar, and official Yerevan removing prospects of return to Karabakh from the political agenda<sup>33</sup>. By the end of 2025, over 26,000 displaced persons had acquired Armenian citizenship, with an additional 6,700 applications pending<sup>34</sup>. Initial broad-based assistance has been progressively replaced by more targeted schemes. Notably, the programme providing compensation for rent and utilities was revised as of 1 April 2025 and is scheduled to be phased out by the end of 2026<sup>35</sup>. Eligibility under this programme was narrowed to specific vulnerable categories – such as persons with disabilities, older persons, recipients of survivor's benefits, certain categories of students, and children – while the benefit level was reduced to AMD 30,000<sup>36</sup>. As housing remains one of the most acute challenges among the displaced population, these reductions prompted an additional share of displaced persons to move abroad, most often to Russia<sup>37</sup>. According to the National Security Service, close to 44,000 forcibly displaced persons had departed Armenia and 28,000 had returned, leaving around 16,000 abroad as of September 2025, and suggesting that a significant share of these movements is temporary<sup>38</sup>. The revision of rental assistance was partly intended to encourage uptake of longer-term measures, notably the housing certificate programme linked to citizenship. However, by 1 February 2026, only 4,404 individuals had received certificates<sup>39</sup>. In response, additional measures introduced in December 2025 targeted remaining gaps, including long-term rent support for vulnerable households excluded from the housing scheme and a self-employment programme providing business training and follow-up support<sup>40</sup>. The integration of displaced persons from Karabakh is likely to remain Armenia's priority in 2026, with continued emphasis on naturalisation and a gradual transition towards self-sufficiency. Depending on the availability of assistance and employment

opportunities, a degree of onward or circular mobility among the displaced population may persist.

The Armenia-Azerbaijan peace process, meanwhile, saw notable progress in 2025. The text of a comprehensive agreement was finalised in March<sup>41</sup> and initialled in August during a U.S.-brokered meeting between Prime Minister Nikol Pashinyan and President Ilham Aliyev<sup>42</sup>. While Armenia signalled readiness to proceed with signature, Azerbaijan continues to link this step to constitutional changes, leaving the process incomplete. At the same time, both sides moved into an implementation-oriented phase, focusing on border delimitation, the normalisation of relations<sup>43</sup>, and potential transport connectivity<sup>44</sup>, including a corridor linking Azerbaijan to Nakhchivan through Armenian territory<sup>45</sup>. Developments in the Armenia-Azerbaijan peace process will remain an important variable in 2026, as a formal agreement would likely support greater regional stability.

Regional developments in Iran introduced a new dimension to Armenia's migration environment in 2025. A short but intense military escalation between Israel and Iran in June 2025 generated episodic migration pressures along Armenia's southern border. Following Israeli strikes and subsequent Iranian retaliation, cross-border movements through the Meghri-Nordooz checkpoint – the country's only land gateway to the Middle East – increased sharply, with reports of continuous flows and several thousand arrivals per day at peak periods<sup>46</sup>. Movements included Iranian nationals, ethnic Armenians returning from Iran<sup>47</sup>, and third-country citizens<sup>48</sup>, with Armenia serving as a transit route for evacuations. Renewed escalation in late February-early March 2026 again activated this corridor, when several hundred individuals – mainly foreign nationals and dual citizens leaving Iran amid airspace disruptions – crossed into Armenia via the same checkpoint<sup>49</sup>.

While these flows remain largely transit-oriented, they highlight Armenia's role as an accessible land exit corridor and have prompted contingency planning for a potential larger-scale influx<sup>50</sup>. A potential increase in Iranian outflows in the event of displacement caused by military strikes cannot be ruled out, requiring preparedness on Armenia's part.

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Alongside these developments, Armenia advanced the visa liberalisation dialogue with the European Union, formally launched in September 2024<sup>51</sup>, with operational engagement continuing throughout 2025. During this period, Armenian and EU officials conducted a series of expert missions and technical meetings covering key areas such as document security, border management, migration and asylum policy, public order, and fundamental rights, marking progress in the technical phase of the process<sup>52</sup>. A key milestone was reached on 5 November 2025, when the European Commission presented the Visa Liberalisation Action Plan (VLAP) in Yerevan. The plan sets out the legislative, technical, and institutional benchmarks required for visa-free travel and comprises approximately 74 measures across core reform areas, signalling the transition to the implementation phase<sup>53</sup>. Subsequent EU assessment missions, beginning in December 2025, have focused on evaluating progress against these benchmarks<sup>54</sup>. While Armenian authorities have indicated that visa-free travel could be achievable within approximately two years if reforms advance as planned, the timeline remains conditional on full compliance with VLAP requirements<sup>55</sup>. EU counterparts have similarly underlined that the process will proceed on a merit-based basis, with continued monitoring and technical engagement until all benchmarks are met.

## Central Asia

Central Asia – comprising Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan – remains one of the most migration-dependent regions of Eurasia. With a combined population of over 80 million and a predominantly young labour force, the region continues to experience significant outward labour migration driven by limited domestic employment opportunities and persistent income disparities. Russia remains the principal destination for labour migrants in the region, and developments in its migration regime have a direct impact on Central Asian states. In 2025, Russia introduced stricter migration enforcement measures, expanding monitoring mechanisms for migrants with irregular status, facilitating removal procedures, and restricting access to certain services (read more in the section *Migration Policy Developments*). Reports of large numbers of migrant workers placed on entry bans or “blacklists” raised concerns about potential return movements to Central

Asia, which could create short-term pressure on domestic labour markets and affect remittance inflows.

In Tajikistan, remittances account for around half of GDP, highlighting the potential economic impact of disruptions in migration to Russia. By late 2025, more than 150,000<sup>56</sup> Tajik citizens and over 90,000<sup>57</sup> Kyrgyz nationals were reportedly included on Russian entry-ban lists. At the same time, Russian authorities introduced temporary legalisation measures for migrants with irregular status. In 2025, more than 150,000 Uzbek citizens benefited from a migration amnesty allowing them to regularise their status or avoid entry bans<sup>58</sup>. Uzbekistan has adopted perhaps the most pragmatic and proactive approach to managing labour migration to Russia. Uzbek authorities expanded consular assistance<sup>59</sup> and engaged directly with Russian counterparts to address legal and administrative barriers, while also promoting greater formalisation of migration through pre-departure training, language testing, and documentation procedures conducted in Uzbekistan<sup>60</sup>. At the same time, the government has tightened domestic oversight of migration processes. As of September 2025, Uzbek citizens readmitted under international agreements or deported for violations abroad may be denied biometric passports for foreign travel for up to two years, and deported nationals may be recorded in a unified electronic database<sup>61</sup>.

Alongside tightening migration policies, the exposure of Central Asian migrants in Russia to heightened xenophobia and legal vulnerability remained a concern. Human Rights Watch documented a marked deterioration in the environment facing Central Asian migrants, including ethnic profiling, arbitrary arrests, and harassment by police and nationalist groups, alongside stricter administrative practices and deportations, following the 2024 terrorist attack near Moscow<sup>62</sup>. These developments have reinforced efforts by Central Asian governments to diversify migration destinations beyond Russia. In April 2025, Uzbekistan signed a labour migration memorandum with Germany, building on the comprehensive migration and mobility agreement concluded between the two countries in September 2024, which combines cooperation on legal labour migration with provisions on return and readmission<sup>63</sup>. The partnership aims to facilitate the recruitment of Uzbek workers to address labour

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shortages in Germany while strengthening vocational training, language preparation, and regulated mobility channels. In a similar vein, Kyrgyzstan and Germany moved toward a bilateral labour migration agreement in 2025, which would allow German employers to recruit qualified Kyrgyz workers under simplified procedures, targeting sectors such as nursing, metalwork, and software development<sup>64</sup>. Meanwhile, Tajikistan has also sought to diversify labour migration destinations, including through new labour quotas for workers in South Korea under the Employment Permit System, while exploring additional mobility channels with countries such as Japan and the Benelux states in sectors including agriculture, construction, healthcare and social services<sup>65</sup>.

The digitalisation of migration governance has emerged as another important trend in 2025 in Central Asia. Governments are increasingly introducing digital platforms to manage labour migration, monitor mobility, and streamline administrative procedures. Kazakhstan has begun integrating migration data into a unified digital system and now requires employers to register vacancies on a national labour exchange portal before recruiting foreign workers<sup>66</sup>. Kyrgyzstan has introduced a “single window” mechanism for migration services<sup>67</sup>. Uzbekistan is also investing in digital migration infrastructure, including the development of “smart migration stations” designed to centralise services related to migration registration, visas, and work permits<sup>68</sup>.

Developments related to Afghanistan continued to shape migration discourse and security considerations in Central Asia in 2025. Although the number of Afghans in the region remains small – around 25,000 refugees, asylum seekers, and persons in need of international protection across Tajikistan, Turkmenistan, and Uzbekistan<sup>69</sup> – the situation is closely monitored by Central Asian governments. In 2025 alone, over 2 million Afghans returned from Iran and Pakistan, many under conditions of pressure or deportation, adding further strain to Afghanistan’s fragile humanitarian and economic situation<sup>70</sup>, and raising concerns about secondary displacement to Central Asia. Security considerations related to Afghanistan also intensified in late 2025 following several incidents along the Tajikistan-Afghanistan border, including attacks targeting infrastructure and economic projects near the border.

Although Taliban authorities distanced themselves from these incidents, the events could affect border regions and cross-border mobility<sup>71</sup>. Escalating tensions in Iran in early 2026 added further uncertainty to the regional migration outlook. In the event of large-scale displacement from Iran, involving both Iranian and Afghan populations, some movements could shift eastward through Afghanistan toward Tajikistan and Uzbekistan. However, Central Asian border regimes are restrictive, asylum systems are limited, and governments prioritise internal stability and security considerations. Turkmenistan, although sharing over 1,000 km of border with Iran, maintains particularly strict entry policies, while Tajikistan and Uzbekistan have limited capacity to host large refugee populations and would likely respond to any major influx by tightening border controls and seeking international support<sup>72</sup>.

Migration dynamics in Central Asia are likely to remain strongly shaped by developments in Russia, whose policies related to curbing irregular migration are expected to take greater effect in 2026. At the same time, governments across the region are expected to continue diversifying labour mobility corridors and strengthening state management of migration through bilateral agreements. Security developments related to Afghanistan and wider developments in the Middle East may sustain precautionary border policies, although large inflows into Central Asia remain unlikely.



## | Migration trends in the region

This section covers key migration trends observed in the EECA region in 2025, focusing on the structural drivers and performance of the EECA economies, labour mobility patterns, as well as displacement and irregular migration dynamics, drawing where necessary on the most recent available data from 2024.

### **Economic performance across the region**

The economies of the EECA region continue to face an uncertain macroeconomic environment, shaped by the prolonged impacts of Russia's invasion of Ukraine, persistent geopolitical tensions, inflationary pressures, and increasing global economic fragmentation. Across the region, an estimated real GDP growth in 2025 remained positive but generally moderated. Kyrgyzstan recorded the highest growth rate in the region in 2025, followed by Tajikistan, Georgia, Uzbekistan and Kazakhstan (see Table 1). Growth in Armenia and Georgia, although still robust, began to moderate as declining remittances and weaker export earnings weighed on consumption and external balances. Azerbaijan recorded a more noticeable growth moderation due to the slow execution of public investment projects and technical issues constraining oil production. In Belarus, Moldova, Russia, and Ukraine – economies that experienced the sharpest contractions in 2022 – growth remained fragile and uneven. Moldova's economy continued to stabilise, supported by recovering domestic demand, but remained highly exposed to external shocks and labour outflows. Ukraine's economy expanded modestly despite continued attacks on infrastructure, weak agricultural performance, and labour shortages. Belarus and Russia recorded low positive growth as domestic activity adjusted to sanctions, tighter financial conditions, and restricted external integration.<sup>73</sup>

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

Country	2021	2022	2023	2024	2025e	2026f	2027f
Armenia	5.8	12.6	8.3	5.9	5.2	4.9	4.7
Azerbaijan	5.6	4.6	1.4	4.1	1.9	1.8	1.7
Belarus	2.4	-4.7	4.1	4.0	1.9	1.3	0.8
Georgia	10.5	11.0	7.8	9.7	7.0	5.5	5.0
Kazakhstan	4.3	3.2	5.1	5.0	6.0	4.5	3.9
Kyrgyzstan	5.5	9.0	9.0	9.0	9.2	6.5	6.8
Moldova	13.9	-4.6	1.2	0.1	2.9	2.7	3.8
Russia	5.6	-1.2	4.1	4.3	0.9	0.8	1.0
Tajikistan	9.4	8.0	8.3	8.4	8.0	6.2	4.7
Turkmenistan	No data available						
Ukraine	3.4	-28.8	5.5	2.9	2.0	2.0	4.0
Uzbekistan	7.4	6.0	6.3	6.6	6.2	6.0	5.9

Source: World Bank, Global Economic Prospects January 2025 and 2026<sup>74</sup>

In 2026, economic growth across the EECA region is projected to moderate further. It is expected to remain comparatively strong in parts of Central Asia, supported by domestic demand and remittances, while South Caucasus economies are projected to slow as earlier consumption-driven momentum fades and external balances adjust. In Ukraine, Belarus, Moldova, and Russia, growth prospects for 2026 remain subdued and highly uncertain, reflecting continued geopolitical risks, structural constraints, and, in Ukraine's case, the ongoing impacts of war and reconstruction needs<sup>75</sup>.

In 2025, remittances continued to play an important role in supporting economic activity across the EECA region, although their contribution to regional growth moderated. Following the sharp increases observed in previous years, remittance inflows have largely normalised, reflecting slower economic

growth in Russia, including its tighter migration policies, and the gradual adjustment of regional economies after the initial disruptions caused by Russia's invasion of Ukraine<sup>76</sup>.

In Armenia and Georgia, remittance inflows plateaued at elevated levels in 2025<sup>77</sup>, remaining above the volumes recorded in 2024<sup>78</sup>. In Armenia, inflows were driven primarily by transfers from Russia and the UK<sup>79</sup>, while those to Georgia were dominated by transfers from the US, Italy, and Russia. Particularly, strong growth was recorded from EU countries such as Spain and Germany, while inflows from Russia and Kazakhstan declined<sup>80</sup>. Nevertheless, the macroeconomic importance of remittances declined in both countries. In Armenia, the remittances-to-GDP ratio fell from 11.2% in 2021<sup>81</sup> to 3.2% in 2025<sup>82</sup>, while in Georgia it declined from 13% to around 9.8% over the same period<sup>83</sup>.

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<sup>84</sup>

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In Central Asia, inward remittance flows remained more dynamic. Total remittances continued to grow in Kyrgyzstan, Tajikistan, and Uzbekistan, supported by strong labour demand in Russia, rising nominal wages, and the appreciation of the rouble in early 2025<sup>85</sup>. In Kyrgyzstan, remittances increased by over 16% year-on-year in January-September 2025. In the first half of 2025, remittances from abroad increased by 26% year-on-year in Uzbekistan (to around 15% of GDP) and by 57% in Tajikistan (to an estimated 64% of GDP), where they continue to provide critical support to household consumption<sup>86</sup>.

Ukraine, which had previously been the region's largest recipient of remittances, experienced a fifth consecutive year of declining inflows, bringing the remittances-to-GDP ratio to an average of 4%<sup>87</sup>.

Despite the large volumes involved, international remittances continue to reach only a limited share of the population globally. In Europe and Central Asia, around 12% of adults receive international remittances. Tajikistan remains among the countries with the highest prevalence of remittance receipt: nearly half of adult population reports receiving transfers from abroad, with even higher shares among rural populations and women. Armenia, Kyrgyzstan, and Moldova also record relatively high proportions of women receiving remittances, underscoring their continued social importance despite a gradual decline in their macroeconomic weight<sup>88</sup>.

## Forced displacement and international protection

The largest forced displacement crisis in Europe – and across the EECA region – since the Second World War has now entered its fifth year following Russia's full-scale invasion of Ukraine. According to UNHCR, close to 6 million people displaced from Ukraine are registered globally<sup>89</sup>, while nearly 4 million remain internally displaced<sup>90</sup> (Ukraine's sources place this number at over 4.6 million). By the end of December 2025, 4.35 million people who fled Ukraine were benefiting from temporary protection in the EU. Germany hosts the largest number of beneficiaries (1,250,620; 28.7% of the EU total), followed by Poland (969,240; 22.3%), while relative to its population size, the highest concentrations are observed in Czechia (36 beneficiaries per 1,000 inhabitants), Poland (26.6), Cyprus and Slovakia (both 25.8)<sup>91</sup>. The overall numbers of beneficiaries of temporary protection have remained broadly stable compared to 2024, with only a slight increase of 2.2%<sup>92</sup> by the end of 2025. However, the issuance of 683,395 new permits suggests significant return or "pendulum" migration, as well as ongoing displacement pressures linked to the war<sup>93</sup>.

### Asylum seekers from EECA region

In contrast to previous years, asylum applications submitted by EECA nationals decreased in 2024 compared to 2023, while preliminary UNHCR data for 2025 point to a renewed rise<sup>94</sup>. Applications from Russia and Uzbekistan doubled in 2023 relative to 2022, before returning to 2022 levels in 2024. This temporary surge was most likely driven by heightened uncertainty surrounding Russia's economic and security situation following its invasion of Ukraine, as well as concerns about potential disruptions to established labour migration corridors between Central Asia and Russia. A similar, though numerically less pronounced, pattern was observed for Kazakhstan, Kyrgyzstan, and Tajikistan, where applications increased in 2023 and then steadily declined in 2024-2025. The displacement of over 100,000 ethnic Armenians from Karabakh led to a global increase in asylum applications from Armenia in 2023. While numbers remained relatively high in 2024, they decreased in 2025.

In contrast, trends in asylum applications from Georgia appear to reflect policy changes within the European Union, particularly in Germany. The number of applications from Georgian nationals declined sharply between 2023 and 2024 – by around 50% overall – with the sharpest decline recorded in Germany (from 8,415 in 2023 to 2,635 in 2024). At the end of 2023, Germany designated Georgia as a safe country of origin, based on the general assumption that applicants do not face government persecution and that state protection against persecution is available<sup>95</sup>. As a result, applications from Georgian nationals may be processed under accelerated procedure and rejected applicants are required to leave Germany more quickly. This policy shift is also reflected in changing destination patterns, with Germany no longer the primary country of asylum for Georgian applicants, unlike in previous years. Recognition rates for Georgian, Moldovan, and Armenian asylum seekers remained low in recent years. By contrast, among EECA nationals, Belarusian asylum seekers continue to have the highest recognition rate, reaching 67.2% in 2025 (1,243 positive decisions)<sup>96</sup>.

Table 3. Asylum applications submitted by nationals of EECA countries globally

Country of origin	2022	2023	2024	2025 (early estimates)	Top countries of asylum in 2025	Recognition rate 2025 <sup>a</sup>
Armenia	8,497	10,299	6,665	1,752	FR, DE, BE	6.6
Azerbaijan	3,099	3,995	3,933	1,472	DE, CA, FR	14.2
Belarus	7,224	8,485	5,677	1,850	PL, NL, FR	67.2
Georgia	30,518	33,963	17,124	6,730	IT, FR, DE	6.07
Kazakhstan	4,380	5,536	3,529	893	KR, UK, FR	18.5
Kyrgyzstan	2,435	5,301	4,305	424	IT, KR, UK	13.9
Moldova	5,745	4,619	3,278	1,182	DE, BE, IT	3.5
Russia	36,488	72,136	32,791	6,323	DE, KR, FR	32.8
Tajikistan	2,685	4,125	5,388	1,043	DE, KR, KG	18.4
Turkmenistan	537	1,405	932	223	DE, KR, RU	31.4
Ukraine <sup>b</sup>	152,008	34,261	42,966	21,327	FR, PL, RU	47.2
Uzbekistan	6,141	13,815	9,292	979	KR, UK, SE	21.9

Source: UNHCR Refugee Data Finder

In 2024, the United States emerged as the top destination for asylum seekers from Armenia, Kazakhstan, Kyrgyzstan, Russia, Turkmenistan, and Uzbekistan; however, this trend did not continue in 2025. At the same time, the Republic of Korea remained among the top three countries for asylum seekers from Russia and all five Central Asian states<sup>97</sup>.

a The recognition rate is estimated based on the number of applications submitted in 2025 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 16 February 2026

b The number of applications and recognition rate refer to applications and positive decisions on refugee status and subsidiary protection for Ukrainian asylum seekers, i.e. do not include beneficiaries of temporary protection.

The increase in Russian asylum seekers in South Korea may be linked to the visa-free regime for Russian citizens, combined with their exodus in 2022 following the invasion of Ukraine, and related security and economic challenges. The growing number of asylum applications in South Korea from certain Central Asian countries also suggests the gradual emergence of new migration routes. Moreover, in recent years, South Korea has been attracting a growing number of Central Asian labour migrants seeking employment opportunities beyond Russia.

Eurostat data broadly mirrors global trends in asylum applications from EECA nationals. The number of applications in the EU from most EECA countries declined in 2024, with preliminary data from 2025 indicating a further decrease. Compared with 2023, the most significant reductions in 2024 were observed among Russian and Georgian applicants, by 42% and 40%, respectively<sup>98</sup>. In the Georgian case, German policies discussed above have likely had an impact. An exception to the trend is Tajikistan, where applications in the EU, in contrast, increased in 2024.

Applications submitted by Ukrainian citizens in 2022 (excluding those under temporary protection), followed a more volatile pattern: after a sharp increase in 2022, they declined significantly in 2023, before nearly doubling again in 2024 – from 13,540 to 26,430<sup>99</sup>.

A gradual shift in destination preferences is also evident. While Germany was the primary destination for many EECA asylum seekers in 2021–2022, its relative importance has since declined. This trend continued in 2024–2025, with Germany no longer the leading destination for applicants from Armenia, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Ukraine, and Uzbekistan. It nevertheless remains the top destination for applicants from Azerbaijan, Moldova, Russia, Tajikistan, and Turkmenistan.

Table 4. Asylum applications submitted by citizens of EECA countries in the EU

EECA country of origin	2022	2023	2024	Jan–Oct 2025, estimates	Top 3 destination EU MS in 2025	Recognition rate in 2024 <sup>c</sup>
<b>Armenia</b>	5,240	6,110	5,130	2,445	FR, DE, BE	4.09
<b>Azerbaijan</b>	3,030	3,160	3,140	1,765	DE, FR, BE	7.3
<b>Belarus</b>	5,430	5,570	5,110	2,710	PL, FR, NL	58.2
<b>Georgia</b>	28,460	24,770	14,785	10,630	IT, FR, DE	7.1
<b>Kazakhstan</b>	810	790	600	310	FR, DE, SE	10.8
<b>Kyrgyzstan</b>	525	570	510	345	IT, FR, DE	9.8
<b>Moldova</b>	8,350	5,930	5,105	1,890	DE, IT, FR	1.8
<b>Russia</b>	16,835	22,750	13,245	6,565	DE, FR, ES	21.6
<b>Tajikistan</b>	1,610	930	1,450	720	DE, PL, LV	10.7
<b>Turkmenistan</b>	340	230	260	180	DE, PL, NL	11.5
<b>Ukraine</b>	27,030	13,540	26,430	18,835	FR, PL, NO	51.4
<b>Uzbekistan</b>	1,460	1,480	1,240	545	SE, NL, CZ	4

Source: Eurostat

In 2024, the highest recognition rate for international protection in the EU was recorded among Belarusian and Ukrainian applicants, at 58.2% (655 refugee status decisions and 2,300 grants of subsidiary protection) and 51.4% (285 refugee status decisions and 13,205 grants of subsidiary protection), respectively. This was followed by Russian applicants, with a recognition rate of 21.6%. In contrast to applicants from Belarus and Ukraine, most positive decisions for Russian beneficiaries resulted in the granting of refugee status (2,400 decisions), rather than subsidiary protection (240 decisions)<sup>100</sup>.

<sup>c</sup> The recognition rate is estimated based on the number of applications submitted in 2024 and the total number of positive decisions (including refugee status and subsidiary protection) issued within the same year.

## Temporary protection for non-Ukrainian persons displaced from Ukraine

Although it receives less public attention than the situation of Ukrainian citizens, non-Ukrainian beneficiaries of temporary protection represent another important aspect of the overall temporary protection landscape. By the end of 2025, 68,665 third country nationals<sup>d</sup> had been granted temporary protection in the EU, nearly half of whom (33,450) originated from the EECA region. Russians constituted the largest group, with 12,290 beneficiaries, primarily registered in Germany, Spain, and Poland. Overall, Germany remained the main destination for EECA nationals benefiting from temporary protection<sup>101</sup>.

Table 5. Beneficiaries of temporary protection from the EECA region, end-2024 and end-2025 (stock)

EECA country of origin	2024	2025
Armenia	3,270	3,240
Azerbaijan	4,235	4,325
Belarus	2,670	2,375
Georgia	3,565	3,495
Kazakhstan	485	460
Kyrgyzstan	310	295
Moldova	3,730	3,615
Russia	12,380	12,290
Tajikistan	830	790
Turkmenistan	1,450	1,320
Ukraine	4,189,980	4,284,165
Uzbekistan	1,290	1,245

Source: Eurostat

<sup>d</sup> In this case: non-Ukrainian citizens, who resided in Ukraine on 24 February 2022 and left to the EU because of Russia's invasion

The number of Ukrainian beneficiaries of temporary protection in the EU increased by 94,185 (2.2%) in 2025 compared to 2024. The most significant monthly increases were recorded at the end of September 2025 (+48,895 people or 1.2%), November 2025 (+30,875 or 0.7%) and December 2025 (+24,400 or 0.6%)<sup>102</sup>. These increases were primarily recorded in Germany, Spain, and Romania. During the rest of the year, the number of beneficiaries slightly declined, with the most notable decreases registered in France and Estonia<sup>103</sup>. One contributing factor to the late-year increase may have been regulatory changes in Ukraine. On 26 August 2025, the Cabinet of Ministers adopted amendments to the rules governing cross-border travel for men aged 18 to 22<sup>104</sup>, which entered into force on 28 August. The rise in beneficiary numbers between September and December may therefore be partly associated with increased departures of young men following this change, as well as seasonal factors, including anticipation of more difficult winter conditions.

By the end of December 2025, the largest numbers of beneficiaries of temporary protection from Ukraine were hosted by Germany (1,250,620 people; 28.7% of the EU total), Poland (969,240; 22.3%) and Czechia (393,055; 9.0%). Relative to population size, this corresponded to an EU average of 9.7 beneficiaries per 1,000 inhabitants. Within the EU, the highest ratios were observed in Czechia (36.0 per 1 000 people), followed by Poland (26.6), Cyprus, and Slovakia (both 25.8). In terms of demographic composition, adult women made up 43.6% of beneficiaries, with a majority (54.2%) aged between 35 and 64. Minors represented almost one third (30.5%), while adult men accounted for 25.9% at the end of 2025<sup>105</sup>.

### Asylum seekers within EECA region

All countries in the region, with the exception of Uzbekistan, are parties to the 1951 Refugee Convention, have established legal protection frameworks, and implement asylum procedures. In 2025, according to UNHCR, Russia received the highest number of asylum applications in the region, with most applicants coming from Syria and Ukraine. It also reported the highest recognition rate, at 91.8%. Tajikistan received almost 15,000 applications in 2025,

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all submitted by Afghan nationals, of whom almost half were granted international protection in 2025. In Moldova and Belarus, most applicants in 2025 were Ukrainian nationals. Moldova received over 1,300 applications, including 1,163 from Ukrainians, while Belarus registered 1,187 applications, 1,154 of which were submitted by Ukrainian nationals. In Belarus, more than 80% of applicants were granted some form of international protection, whereas in Moldova the recognition rate in 2025 stood at 4.6%. This discrepancy can largely be explained by the existence of a temporary protection framework in Moldova, which is not reflected in UNHCR statistics as a form of international protection. Despite the ongoing Russia's aggression, Ukraine continued to operate its asylum system throughout 2022-2025, with most applicants in 2025 coming from Russia<sup>106</sup>.

Table 6. Asylum applications submitted within EECA region

EECA country	2022	2023	2024	2025 estimates	Top 3 countries of origin in 2025	Recognition rate in 2025
Armenia	965	816	648	333	IR, IQ, RU	38.7
Azerbaijan	297	189	244	29	UA, PK	0
Belarus	2,546	1,375	2,243	1,187	UA, LV, SY	81.8
Georgia	1,448	1,040	1,644	613	IN, TK, PK	2.4
Kazakhstan	631	475	191	74	UA, AF, IR	70.2
Kyrgyzstan	435	823	2,323	457	AF, TJ, SY	3.1
Moldova	9,118	4,104	8,143	1,344	UA, RU, TK	4.6
Russia	102,956	8,507	7,018	4,242	SY, UA, AF	91.8
Tajikistan	334	925	5,307	1,447	AFG	49.9
Turkmenistan	No data available					
Ukraine	220	106	92	28	RU, TJ, BY	17.9

Source: UNHCR Refugee Data Finder

## Internal displacement in EECA region

Since 2014, Ukraine has faced a significant conflict-driven displacement, with over 800,000 internally displaced persons (IDPs) officially registered by 2021<sup>107</sup>. Following Russia's full-scale invasion in 2022, internal displacement increased dramatically, with an estimated 3.7 million *de facto* IDPs. The largest number of IDPs stay in Dnipropetrovska oblast (557,000, 15% of the total) and Kharkivska oblast (415,000, 11%), followed by Kyiv City (348,000, 9%) and Kyivska oblast (324,000, 9%). Notably, about one-third (34%; 1,274,000) of all IDPs resided in frontline regions. Displacement has become increasingly protracted: over 70% of IDPs have been displaced for more than two years, and over 80% for more than one year. Women constitute the majority of IDPs and often face heightened vulnerabilities<sup>108</sup>. As displacement persists, social cohesion has emerged as a growing concern. Tensions with host communities are primarily linked to perceived inequalities in access to cash and other forms of assistance. In Ukraine's western regions, IDPs' political, cultural, or linguistic differences may further exacerbate these tensions<sup>109</sup>. According to IOM, more than 450,000 people were newly displaced in 2025 alone, many of them for the second or even third time<sup>110</sup>. While returns are expected to increase in 2026 – with the number of IDP returnees projected to reach around 770,000<sup>111</sup> – these movements remain highly fragile. Continued insecurity, particularly in frontline and border regions, and sustained attacks on energy infrastructure might trigger further displacement, with up to 325,000 Ukrainian returnees<sup>112</sup> at risk of being displaced again.

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. In spring 2024, heavy rainfall and rapid snowmelt caused Kazakhstan's most devastating floods in 80 years, prompting a state of emergency in several regions and resulting in approximately 120,000 internal displacements<sup>113</sup>. The combined effects of climate change, environmental degradation, and longstanding disputes over water resources continue to pose a risk of future displacements in the region.

## 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 fifth consecutive year, the Outlook examines labour migration from EECA countries to two principal destinations – the EU and Russia. While structural drivers of migration persist, the post-2022 geopolitical reconfiguration, the war in Ukraine, and tightening migration policies are increasingly reshaping regional mobility patterns.

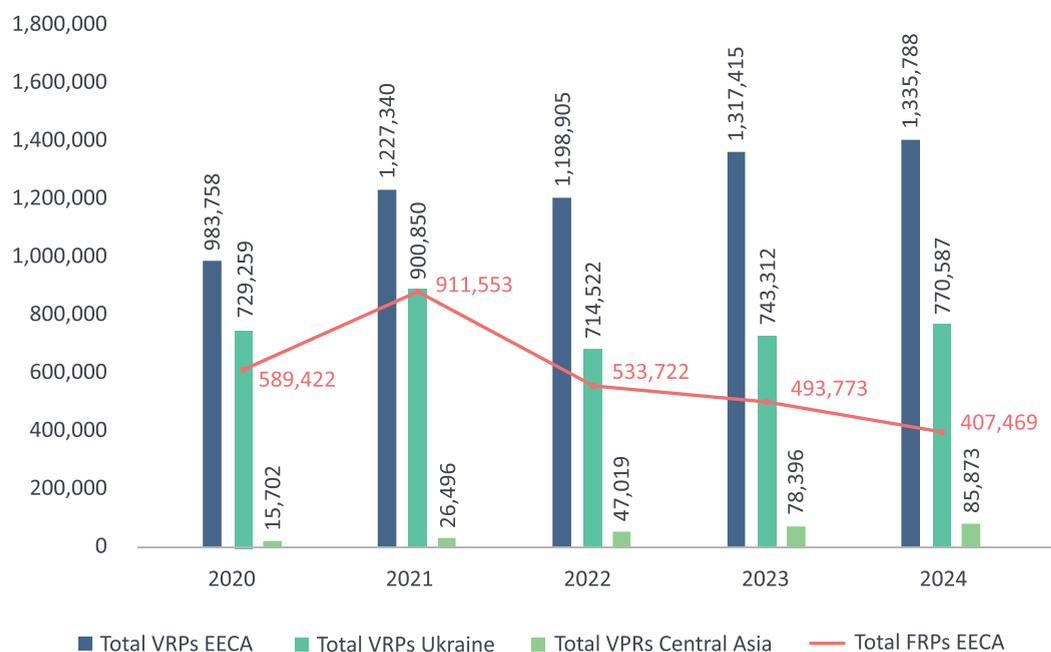
### Labour migration of EECA nationals to the EU

The EU remains one of the key destinations for labour migrants from EECA. By the end of 2024, the number of valid residence permits issued for employment to EECA nationals exceeded 1.33 million<sup>114</sup> – making up nearly a quarter of all valid work permits held by non-EU nationals that year – representing an increase of more than 137,000 compared to 2022 and a 66% rise compared to 2018. This sustained expansion confirms the region’s entrenched structural role in supporting European labour markets. In parallel, the number of first-time work permits issued to EECA nationals has steadily declined, falling from a peak of over 911,500 in 2021 to just over 407,000 in 2024, with a year-on-year decrease of more than 12% from 2023<sup>115</sup>. The growing divergence between the expansion of the stock and the contraction of inflows suggests that EECA-EU labour migration patterns are currently shaped less by new labour cohorts and more by the retention of an EECA migrant labour force already present in the EU. However, significant sub-regional variation persists, with Central Asian migration remaining more dependent on new labour inflows.

As in previous years, nationals of Ukraine, Belarus, Russia, Moldova, and Georgia together accounted for over 90% of all valid (1.25 million) and 90% of first (366,000) employment-related residence permits held by EECA nationals in 2024. Ukrainians remain by far the largest group among both EECA and all non-EU employment permit holders in the EU<sup>116</sup>. The stock of valid work permits held by Ukrainian nationals reached 770,587 in 2024.

In contrast, first-time permits continued to decline, falling from 768,304 in 2021 to 213,780 in 2024. Prior to 2022, inflows and stocks moved broadly in tandem, with strong first-time issuance translating into stock expansion. Since Russia’s invasion of Ukraine, however, this proportional relationship has weakened. Although more than 200,000 first permits were still issued annually in 2023 and 2024, net annual stock growth remained limited to around 28,000. This pattern suggests that permit stocks are increasingly shaped by retention dynamics – including renewals, prolonged residence, reduced exits, and status transitions – rather than by new inflows. Moreover, more than four million Ukrainians have been granted temporary protection with immediate access to employment in the EU since 2022, and labour market participation rates among this group have been rising across Member States<sup>117</sup>. Employment of Ukrainian nationals in the EU currently occurs through multiple legal pathways, with work permits representing only one component of a broader system of labour market access. The interaction between temporary protection arrangements, transitions into other residence statuses, and mobility decisions shaped by the war and reconstruction prospects will influence both the scale and composition of the Ukrainian workforce in the EU in the coming years. Monitoring these status trajectories will be central to assessing the EU’s medium-term labour market stability and evolving migration governance needs in both the EU and Ukraine.

Figure 1. All valid and first residence permits issued for employment in the EU to citizens of EECA countries between 2020 and 2024



Source: Eurostat; Legend: valid residence permits = VRPs, first residence permits = FRPs

Belarusian labour migration to the EU, after a period of rapid expansion, has moderated. Between 2018 and 2023, the stock of valid work permits issued to Belarusian nationals increased more than sixfold, from 34,000 to over 209,000, driven by domestic political and socio-economic pressures. In 2024, however, the stock declined by 16% to around 176,000, while first-time work permits fell sharply by 35% to 96,500, marking one of the steepest relative declines among major origin countries EU-wide. This contraction was overwhelmingly driven by issuance in Poland, which accounts for the vast majority of Belarusian first and valid work permits. The high geographic concentration in a single EU Member State makes Belarusian labour migration particularly sensitive to policy and labour market dynamics in Poland. Since 2018, the stock of Russian nationals holding valid work permits has roughly doubled, reaching over 130,400 in 2024. Prior to the invasion of

Ukraine, Russian labour migration to the EU was heavily concentrated in Poland. In 2022, however, it shifted westward, with sharp increases in first-time work permits in Germany, Cyprus, Spain, the Netherlands, and Finland, reflecting relocation-driven mobility, corporate transfers and high-skilled departures following the outbreak of war. By 2024, first permits declined by 35% year-on-year as the initial relocation surge subsided and entry conditions tightened in several Member States<sup>118</sup>. Spain was a notable exception, becoming the largest issuing country of first work permits for Russians in 2024. Future labour migration from Russia is likely to remain uneven, shaped primarily by EU policy decisions and the broader geopolitical context.

Labour migration from Georgia has followed a consistent upward trajectory since 2018, with the stock of valid work permits in the EU more than tripling to nearly 72,700 in 2024. Growth was driven by steady corridor expansion, particularly in Central and Southern Europe. Although first-time work permits declined by 13% in 2024, stocks continued to grow by 13.6% year-on-year, indicating ongoing embedding within EU labour markets. Similar to Georgia, labour migration from Armenia and Azerbaijan to the EU reflects incremental but sustained expansion. Armenian work permit stocks nearly doubled between 2018 and 2024, rising from 5,200 to just over 10,200, while Azerbaijan experienced even stronger growth, more than tripling from 4,800 to 16,300 over the same period. In both cases, 2024 saw declining first-time permits but continued stock growth.

Unlike other EECA countries, Moldovan labour migration has shown remarkable stability. The stock of valid work permits has fluctuated only marginally around 74,000-76,000 since 2018, while first-time permits have consistently hovered around 10,000 annually, aside from a temporary increase in 2022. This long-term plateau suggests a saturated migration corridor in which inflows largely offset exits, and labour-market integration has already reached a steady state. At the same time, a share of Moldovan population holds Romanian or Bulgarian citizenships, enabling intra-EU mobility and employment without the need for a work permit, which may partly explain the relatively stable permit figures.

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Migration from Central Asia continues to represent a smaller share of labour migration to the EU – around 1.5% of all valid work permits issued to third country nationals EU-wide and some 6.4% of valid work permits issued to EECA nationals in 2024 – but represents the most dynamic and strategically significant segment of EECA-EU labour mobility. Between 2018 and 2024, both the number of valid and first work permits issued to Central Asian nationals in the EU increased sharply. The number of valid permits issued for Uzbek workers increased eightfold to over 37,600; those issued to Kyrgyz nationals grew more than sevenfold to over 17,000; and those to Tajik nationals increased more than fourteenfold to over 12,000. Kazakhstan recorded steady growth, while Turkmenistan remains small but rising. Although first-time work permits declined in 2024 – reflecting the broader EU contraction in new employment admissions – overall stocks continued to grow or stabilise at elevated levels, suggesting a gradual shift from purely entry-driven mobility toward repeat migration, permit renewals, and longer stays. Evidence from ICMPD Migrant Resource Centres in Tajikistan and Kyrgyzstan shows growing interest in regular labour pathways to EU destinations, particularly Germany and Lithuania. Prospective migrants are increasingly seeking information on regulated recruitment channels, language requirements, and qualification recognition. This behavioural shift reflects structural diversification away from Russia. At the same time, national decisions in the EU can rapidly affect flows. The 2025 closure of the Lithuanian visa centre in Tajikistan disrupted processing for one of the most important EU destinations among Central Asian migrants, illustrating the vulnerability of emerging pathways to administrative changes. Overall, Uzbekistan has emerged as the leading Central Asian labour-sending country to the EU, with nearly 38,000 valid and over 19,000 first-time work permits in 2024. In 2026, large-scale inflow surges from Central Asia remain unlikely under current EU admission frameworks. However, the combination of rising diversification pressures in Central Asia, increasing demand for legal pathways, and emerging bilateral agreements suggests continued gradual expansion.

Geographically, labour migration from EECA to the EU remains highly concentrated in several EU MS. Poland consolidates its position as the primary gateway, ranking as the top host country for the majority of EECA nationals

holding valid work permits and maintaining a leading role in first work permit issuance for most EECA countries. Lithuania has emerged as structurally important, particularly for Central Asian, Belarusian, and Azerbaijani workers. Italy remains a key host country for established labour migrant populations – notably for Moldovan, Ukrainian, and Georgian nationals – although new arrivals remain limited. Germany stands out as the principal destination for Russian labour migrants and remains an important, though not dominant, actor in broader EECA labour mobility, especially in higher-skilled segments. Compared to other EECA nationals, Russian labour migration is more geographically dispersed and more sensitive to geopolitical developments and differentiated national policy responses.

Looking ahead to 2026, labour migration from EECA to the EU is likely to be shaped less by large-scale new inflows and more by the management of existing migrant stocks. Key determinants will include EU and national policies on the future status of Ukrainian beneficiaries of temporary protection, the expansion or restriction of legal labour pathways – particularly for Central Asian countries – and broader developments in the wider region. While overall inflows from EECA may continue to decline, the economic and demographic relevance of EECA workers within EU labour markets is set to remain high.

### Labour migration of EECA nationals to Russia

Labour migration to Russia in 2025 reflected a complex landscape shaped by competing factors. Persistent demographic decline, stemming from the low birth rates, a surge in emigration recorded in 2022, and declining immigration, alongside military conscription and the reallocation of workers to defence-related industries due to the war in Ukraine continue to generate substantial labour demand – estimated at 2.3 million workers<sup>119</sup> in the short-term – while tightening regulatory frameworks and heightened administrative scrutiny have made access to the labour market more restrictive for migrants (read more in the section *Migration Policy Developments*).

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Despite mounting disincentives, official Russian data on border crossings<sup>120</sup>, labour patents<sup>121</sup>, and work permits<sup>122</sup> suggest that labour migration volumes remain elevated, even as country-level trends diverge. Central Asia remains the core source region of migrant labour, but Russia has simultaneously expanded recruitment from countries such as India, Bangladesh, and China.

Structurally, labour migration from EECA to Russia remains anchored in Uzbekistan, Tajikistan, and Kyrgyzstan, whose nationals accounted for over 82% of all work-related border crossings into Russia in 2025, totalling over 3.7 million entries (down from over 4 million in 2024, and 3.9 million in 2023). Uzbek nationals recorded over 2.13 million entries, close to the 2024 peak of 2.18 million. Labour patent issuance for Uzbek citizens continued to rise, reaching 1,478,209 in 2025 (up from 1.35 million in 2024), the highest level since 2019, consolidating Uzbekistan's position as Russia's largest source of migrant labour. Tajikistan, by contrast, showed a divergence between entry flows and formal employment. Work-related crossings declined by around 9% to 949,734 in 2025, marking a second consecutive annual decrease. Yet labour patents issued to Tajik nationals increased to 720,352 in 2025 (which amount to around 7% of Tajikistan's population), up from 679,641 in 2024. This suggests that although fewer Tajik migrants entered Russia, those who did were more likely to formalise their employment or remain for longer periods, consistent with intensified compliance and registration requirements. Combined, Uzbekistan and Tajikistan accounted for approximately 97% of all patents issued in 2025, highlighting the extreme concentration of Russia's patent-based regime in two principal sending countries.

Kyrgyzstan exhibits a related but distinct pattern. As a member of the Eurasian Economic Union (EAEU), its nationals are not subject to the patent system. Similar to Tajikistan, work-related border crossings of Kyrgyz nationals into Russia declined for the second consecutive year, falling by 20% from 772,522 in 2024 to 616,555 in 2025. At the same time, the Eurasian Economic Commission reported more than 700,000 Kyrgyz workers in Russia in the first half of 2025 alone<sup>123</sup> – already exceeding the full-year total of 622,963 recorded in 2024. A comparable dynamic is visible across other EAEU members – Armenia, Belarus, and Kazakhstan – as well as Azerbaijan. In the first half of

2025 alone, 163,229 Armenian, 98,425 Belarusian, and 128,868 Kazakh workers were recorded in Russia, exceeding the full-year 2024 totals by approximately 22%, 49%, and 23%, respectively.

The number of labour patents issued to Azerbaijani nationals increased by 18% to over 66,000 in 2025. Border-crossing trends, however, do not uniformly mirror this rise in registered workers. Work-related crossings declined for Armenia and Azerbaijan by 10% each in 2025 (to 154,540 and 118,393, respectively), and for Belarus by 8% (to 1,593), while Kazakhstan recorded a 24% increase (to 245,633). Even in the case of Kazakhstan, however, the annual expansion in registered employment may ultimately outpace the growth in entries. The widening gap between border crossings and registration statistics signals that intensified enforcement and expanded administrative monitoring appear to be increasing formalisation of migrant employment and registration. Rather than simply attracting more workers, Russia is strengthening state oversight over those already present.

Among other EECA countries, Turkmenistan – traditionally a minor source of migrant labour – recorded a notable spike: 25,000 work permits were issued to Turkmen nationals in 2025 (more than 2.5 times the previous year), alongside over 17,000 work-related border crossings (more than 2.6 times the 2024 level). Meanwhile, labour migration to Russia from the remaining EECA countries – Georgia, Moldova, and Ukraine – remains small in absolute terms, although Georgia has seen a modest uptick.

At the same time, the visa-based channel reveals Russia's parallel diversification strategy. Total work permits issued rose sharply from 170,009 in 2024 to 240,812 in 2025. China remained a major source of foreign labour under the visa regime, with approximately 92,200 permits (48% more than in 2024). Recruitment from India expanded even more rapidly: work permits issued to Indian nationals rose by over 56% to 56,534 in 2025, the highest level on record. In December 2025, Russia and India signed an agreement on temporary employment for Indian citizens, signalling high-level political support for further expansion<sup>124</sup>. Permits for Bangladeshi workers more than tripled to 9,389, while Vietnam recorded a number close to the 2022–2024

levels (23,510). Russian authorities have also signalled interest in expanding labour cooperation with additional partners, including Afghanistan<sup>125</sup>. This diversification does not replace Central Asian migration numerically, which remains an order of magnitude larger, but it reflects a deliberate broadening of source countries in response to labour shortages. The proposed increase of the 2026 work visa quota to 279,000 (approximately 20% higher than in 2025), with 92% allocated to skilled workers for industrial and infrastructure projects<sup>126</sup>, further underscores this pivot.

In 2026, labour migration to Russia is likely to consolidate rather than expand. Central Asian countries will remain the primary suppliers of migrant labour, as established networks, language familiarity, and geographic proximity continue to anchor these corridors. Although the visa-based channel might also grow, supported by an increased 2026 quota and recent bilateral agreements, particularly with India, diversification will not be fast. Recruitment from alternative countries requires institutional arrangements, employer adaptation, logistics and worker integration that take time to develop. It is therefore unlikely that new partners such as India or Bangladesh will replace Central Asian labour in the near term. Instead, 2026 is expected to reinforce a dual-track system: tighter formalisation of traditional flows alongside a slowly expanding, state-managed visa channel targeting selected partners.

## Irregular migration and return

In 2025, the number of irregular border crossings at the EU's external borders exceeded 180,000, representing a decrease of around 29% compared to 2024, of which EECA nationals accounted for approximately 6%<sup>127</sup>. Within this group, crossings were overwhelmingly dominated by Ukrainian nationals (over 10,300). The next most reported nationalities – Russians (159) and Azerbaijanis (119) – accounted for only a small fraction, with all remaining EECA countries registering fewer than 20 detections each. The Eastern Border route (via Ukraine and Belarus) saw a 37% drop in irregular border crossings, and, besides Ukrainians, continued featuring a diverse mix of nationalities, including Somalians, Afghans, and Ethiopians. Their presence points to the continued use of the route beyond regional movements and highlights ongoing concerns about the instrumentalisation of migration at the EU's eastern borders by Belarus and/or Russia<sup>128</sup>. In response, Poland has continued to strengthen its border management framework and in March 2025 introduced legislation allowing the temporary suspension of the right to apply for international protection at the Belarusian border in situations of migration instrumentalisation<sup>129</sup>.

Between 2023 and 2024, total entry refusals of EECA nationals to the EU<sup>130</sup> decreased slightly from 47,105 to 44,670, with their share in overall EU refusals falling from 38% to 36.1%. This small decline was driven by sharp reductions among Russian (-48%) and Belarusian (-66%) nationals, which outweighed increases observed for Moldovan (+23%), Ukrainian (+7%), and Georgian (+12%) nationals. Since 2017, Ukrainians, Moldovans, Russians, and Georgians have consistently been the main EECA nationalities refused entry to the EU. Refusals to Ukrainian nationals remain well below pre-pandemic levels, those to Moldovan nationals have steadily increased to a peak of 12,105 in 2024, while Russian figures have dropped sharply after a spike in 2022. Georgian refusals, after rising in 2022, have since stabilised.

The number of EECA nationals found to be illegally present in EU Member States decreased by 10% in 2024 compared to 2023, marking a reversal after several years of post-pandemic growth. The overall decrease was driven primarily by sharp declines in detections among Moldovan (-27%) and

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Russian (-31%) nationals. At the same time, Central Asian countries continued a gradual upward trend, most notably Uzbekistan (+31%) and Kyrgyzstan (+24%). Overall, the 2024 pattern points to a rebalancing, with declines among some higher-volume nationalities offset by continued increases among smaller, but steadily growing, Central Asian groups. In absolute numbers, Ukrainians, Moldovans, and Georgians remained the top three EECA nationalities most frequently detected as staying irregularly in the EU. Germany continued to report the highest number of apprehensions overall, while Romania recorded the most Moldovan and Ukrainian nationals, replacing Hungary, and Poland remained the main country for Belarusian nationals<sup>131</sup>.

Table 7. EECA nationals found illegally present in the EU

Country	2021	2022	2023	2024	Top 3 EU MS with most apprehensions in 2024
Armenia	1,230	2,025	2,295	2,465	Germany, France, Austria
Azerbaijan	760	1,660	2,225	2,650	Germany, Lithuania, Poland
Belarus	1,650	2,820	4,325	3,830	Poland, Lithuania, Germany
Georgia	11,480	21,570	24,840	20,830	Germany, Poland, Greece
Kazakhstan	700	1,240	2,035	2,135	Germany, Czechia, France
Kyrgyzstan	350	645	995	1,230	Germany/Lithuania, Poland, Bulgaria
Moldova	40,870	45,750	40,205	29,290	Romania, Germany, Hungary
Russia	4,410	10,000	14,900	10,350	Germany, Poland, Slovenia
Tajikistan	500	1,335	1,380	1,385	Germany, Lithuania, Poland
Turkmenistan	70	490	795	830	Germany, Poland, Lithuania
Ukraine	36,305	43,220	40,735	44,695	Romania, Germany, Hungary
Uzbekistan	1,110	2,145	3,425	4,490	Germany, Latvia, Czechia
TOTAL	99,435	132,900	138,155	124,180	

Source: Eurostat

In 2024, a total of 58,500 EECA nationals were ordered to leave the EU<sup>132</sup>, representing a 3% decrease compared to 2023, following a notable increase the year before. As in previous years, most orders were issued to Georgian (17,945; down 11% year-on-year), Moldovan (8,745; down 4%), Ukrainian (8,100; up 6% year-on-year) and Russian (7,565; up 1%) nationals. Preliminary 2025 data point to continued growth in return orders issued to Russian nationals (up by at least 17%)<sup>133</sup>. In relative terms, Azerbaijani nationals recorded the strongest increase (up by 26%) in 2024.

In terms of enforcement, Georgians and Moldovans remained the main nationalities returned, with Georgians recording the highest absolute number among EECA nationals returned from the EU in 2024. Replacing Poland, Germany became the main returning country for Georgian nationals, while Poland recorded the highest number of returns for Moldovans. Continuing their upward trend since 2021, returns of Russian nationals increased by 27% in 2024 year-on-year, with preliminary data suggesting strong growth in 2025<sup>134</sup>. Returns of Ukrainian nationals, on the contrary, declined by 33%, reflecting a sustained decrease over recent years. The most pronounced relative increases in executed returns were observed for Azerbaijani (up by 58%) and Armenian (up by 45%) nationals. With the exception of Turkmenistan, returns also increased across Central Asian nationalities, notably Uzbekistan (up by 10%) and Kazakhstan (up by 24%)<sup>135</sup>.

Return rates to EECA countries remained comparatively high, averaging around 55% in 2024, broadly stable compared to 2023 and well above the EU average for all third-country nationals. Several countries recorded particularly high return rates, including Belarus – over 75% despite the suspension of its readmission agreement with the EU – Kazakhstan and Uzbekistan (both above 75%), and Georgia (around 67%), indicating continued effectiveness of return cooperation despite political and operational constraints.



## | Migration policy developments

This section offers an overview of developments related to Ukraine's EU accession and examines the evolving migration policy landscape of Russia.

### **Recent developments in terms of Ukraine's EU accession ambitions**

Accession negotiations between Ukraine and the EU formally began in June 2024 following the first intergovernmental conference<sup>136</sup>. Despite the ongoing war, Ukraine continued to advance on its EU accession path in 2025, completing screening meetings with the EU for Cluster 1 (Fundamentals), Cluster 2 (Internal Market) and Cluster 6 (External Relations). Within Cluster 1, Chapter 24 (Justice, Freedom and Security) is particularly relevant for migration governance, covering migration, asylum, visa policy, and border management<sup>137</sup>. The European Commission considers Ukraine ready to open negotiations on Cluster 1 – a prerequisite for opening other clusters – but negotiations have not yet formally started, as this requires unanimous agreement among EU Member States<sup>138</sup>.

The 2025 Enlargement Package<sup>139</sup>, adopted by the European Commission in November, noted continued progress in Ukraine's legislative alignment with EU law. Improvements were reported in areas such as foreign policy coordination, agricultural policy, public administration reform, and financial control. In the migration field, Ukraine's legal framework on legal and irregular migration and visa policy is already largely aligned with EU standards. The main challenge now lies in effective implementation, including stronger administrative capacity and inter-agency coordination. At the same time, further reforms remain necessary. The Ukraine 2025 Report<sup>140</sup> highlights the need to strengthen the rule of law, including judicial independence, prosecutorial reform, and the effectiveness of anti-corruption institutions. Additional progress is also required in public administration reform, legislative harmonisation, and the protection of fundamental rights.

The EU has also called for faster implementation of Ukraine’s integrated border management strategy under the 2026-2028 Action Plan<sup>141</sup>.

EU integration is central to Ukraine’s Government Action Programme for 2025-2026<sup>142</sup>, which links rule-of-law reforms, democratic governance, reconstruction and security. In May 2025, the government began preparing the National Programme for the Adaptation of Ukrainian Legislation to EU Law<sup>143</sup>, expected to be adopted in early 2026. Once adopted, it will guide Ukraine’s legislative alignment with EU law. At the same time, reforms supported through the Ukraine Facility<sup>144</sup> have accelerated alignment with EU standards in areas such as energy, regional policy, and environmental protection. The Facility – worth €50 billion for 2024-2027 – serves as a key financial instrument supporting reforms and Ukraine’s EU integration<sup>145</sup>. EU financial support packages for 2026-2027<sup>146</sup> are expected to focus on energy resilience and broader economic stability, reinforcing Ukraine’s integration agenda.

In 2026, three developments will be particularly important to observe. First, progress in the accession process will depend on whether EU Member States reach unanimous agreement to formally open negotiations with Ukraine under the Fundamentals Cluster. Second, attention will increasingly shift from legislative alignment to the effective implementation of reforms, particularly in areas linked to Chapter 24, including migration management, asylum procedures, and integrated border management. Third, the EU and its Member States will need to clarify longer-term arrangements for displaced Ukrainians as the temporary protection framework approaches its next review phase. In this context, the EU has begun preparing for the longer-term situation of displaced Ukrainians in the Union, encouraging Member States to gradually transition beneficiaries of temporary protection towards national residence permits or voluntary return when conditions allow.

## Russia advances digitalised migration control under its new Migration Policy Concept

In October 2025, Russia’s new State Migration Policy Concept for 2026-2030<sup>147</sup> was approved, replacing the 2018 concept that ran through the end of 2025. While the Concept recognises the continued importance of labour migration, it places stronger emphasis on reducing irregular stay, enhancing public order, and increasing selectivity in admission and settlement. In particular, it suggests a clearer distinction between temporary labour migration and long-term residence, and signals that family migration and other settlement pathways may face increased constraints. An early read by the Centre for Eastern Studies<sup>148</sup> suggests that the concept places “security at the core”, implying a more segmented approach in which controls over migrants from traditional origin countries such as Central Asian states are further tightened, while more selective recruitment from other regions is permitted, effectively redefining who is “wanted” and under what conditions. Overall, the Concept formalised a policy direction that had already been taking shape over the past several years, signalling that Russia’s migration governance is no longer primarily an economic policy domain but an extension of internal security policy. The developments of 2025 should therefore be understood as a scaling of the enforcement architecture introduced in 2024, such as the “registry of controlled persons,” which by early 2026 featured around 840,000 individuals<sup>149</sup>, including those with expired permits, rejected asylum applications, and children who failed school integration requirements. New in 2025 was the use of this registry to enforce exit notifications. Migrants listed were required to report their departure and confirm it through a centralised digital portal. Failure to comply triggered five-year re-entry bans and potential criminal charges<sup>150</sup>.

The tightening of migration governance was also visible in enforcement outcomes. Prime Minister Mishustin reported that 72,000 foreign nationals were forcibly deported in 2025<sup>151</sup>, compared to over 80,000 in 2024<sup>152</sup> (twice the 2023 figure), suggesting both sustained large-scale enforcement and the influence of temporary regularisation measures (valid until early September 2025) that reduced immediate removals<sup>153</sup>. Targeted enforcement operations

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also continued: a single campaign led to the deportation of roughly 19,000 migrants and thousands of criminal cases related to irregular migration and associated offences<sup>154</sup>. These dynamics were accompanied by a decline in the foreign population in Russia from around 6.3 million to 5.7 million between early 2025 and early 2026<sup>155</sup>.

What sets 2025 apart is not the scale of enforcement per se but its increasing embedding within digital and biometric systems. Federal Law No. 121<sup>156</sup>, adopted in May 2025, introduced an experimental regime in the Moscow agglomeration, running from September 2025 until September 2029, that replaces traditional migration registration with app-based enrolment, requiring migrants to install a state application, share real-time location data, and complete biometric registration, with non-compliance potentially affecting their legal status<sup>157</sup>. The shift towards integrated digital governance was further reinforced in July 2025 through the introduction of a “digital profile of a foreign citizen”<sup>158</sup>. The system, scheduled for implementation by mid-2026, is intended to consolidate data across migration, border control, employment, and enforcement domains into a single state information resource. In practice, this represents a transition towards a “digital dossier” model of migration governance<sup>159</sup>, in which legal status, compliance history, and access to services are increasingly mediated through interconnected databases. While reflecting broader global trends toward digitalisation and biometric identification in migration management<sup>160</sup>, the Russian approach illustrates a more far-reaching application of such tools, which may raise questions regarding proportionality, data protection, and the potential for unequal impact on specific migrant groups.

Parallel to developments in internal monitoring, Russia has also advanced a biometric-centred approach to border management. Building on a pilot launched in late 2024 and later extended until 30 June 2026, the year 2025 saw the operational expansion of digital pre-arrival procedures and biometric data collection at entry points. Foreign nationals entering Russia under visa-free regimes (e.g. from Uzbekistan) are required to submit an electronic notification of entry in advance via a dedicated mobile application, what allows authorities to screen travellers before they reach the border.

Biometric data collection – initially introduced at selected airports – has been extended to additional border crossing points and applied more systematically.<sup>161</sup> According to publicly reported operational results, more than 1,700 individuals were denied entry during the first eleven months of 2025.<sup>162</sup>

At the same time, the 2025 policy package also included several measures that introduced elements of flexibility, particularly in the field of labour migration. Federal Law No. 121-FZ<sup>163</sup> created a legal mechanism allowing foreign workers holding a work patent in one region to work in a neighbouring region under bilateral agreements without having to obtain a second patent, initially covering the Moscow and Saint Petersburg agglomerations. Another example is a temporary regularisation scheme for Moldovan citizens<sup>164</sup>, allowing those entering Russia between 1 October 2025 and 1 January 2026 to work without obtaining a labour patent until 1 October 2026, provided they registered with the Ministry of Internal Affairs and underwent fingerprinting and medical screening. However, these facilitative elements were accompanied by significantly raised state duties for core migration procedures, including registration, extension of stay and the issuance or renewal of work patents<sup>165</sup>.

The broader implications of these measures will become clearer in 2026. Two dynamics will be important to observe. First, the combination of stricter enforcement, expanded digital monitoring and higher administrative costs may paradoxically contribute to new forms of irregularity, as migrants risk falling out of legal status due to procedural and technological barriers rather than deliberate non-compliance. In such cases, the enforcement architecture could become partly self-reinforcing, with stricter compliance requirements generating additional irregularity. Second, the tightening of migration governance may interact with persistent labour shortages across several sectors of the Russian economy. Increased compliance burdens and uncertainty may discourage migrant inflows and further reduce the availability of workers in sectors traditionally reliant on foreign labour.



## Conclusions

In 2025, migration across Eastern Europe and Central Asia continued to be shaped by a combination of protracted conflict, economic uncertainty, demographic pressure, and increasingly interventionist migration governance. The year did not bring a single transformative shock across the region. Rather, it confirmed that migration in EECA is being restructured through long-term trends that are likely to remain decisive in 2026.

First, the war in Ukraine remained the single most important factor shaping regional migration dynamics. Four years after Russia's full-scale invasion, large-scale displacement from Ukraine has become increasingly protracted. While overall numbers of displaced Ukrainians abroad remained relatively stable, return intentions continued to diversify and, in many cases, weaken as integration in host countries deepened and security conditions in Ukraine remained fragile. At the same time, the absence of renewed mass outflows in 2025 should not be interpreted as a sign of stabilisation. Continued attacks on infrastructure, repeated internal displacement, and the uncertainty surrounding the war underline that Europe may still face renewed large-scale movements. In 2026, developments on the battlefield, the durability of temporary protection in the EU, and the availability of pathways into longer-term residence will remain central to understanding future mobility from and to Ukraine.

Second, 2025 confirmed that displacement in the wider region is no longer limited to Ukraine alone. Moldova and Armenia continued to manage major protection and inclusion challenges linked to displacement from Ukraine and Karabakh respectively, while countries of the South Caucasus and Central Asia also faced new contingency pressures linked to developments in Iran. Across these cases, a common pattern is evident: emergency reception systems are gradually giving way to more selective and fiscally constrained approaches centred on inclusion, self-reliance, and administrative regularisation. In 2026, the sustainability of these approaches will depend on the capacity of national institutions to move from short-term humanitarian support to long-term integration policies, while maintaining international backing.

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Third, labour migration remained the most important form of cross-border mobility in much of the region, but its geography continued to evolve. Russia remained the principal destination for Central Asian labour migrants, yet 2025 showed more clearly than before that this corridor is becoming more formalised, more controlled, and more politically sensitive. Russia's tighter enforcement, digital surveillance systems, and increased selectivity in admission are likely to intensify in 2026. At the same time, Central Asian governments are actively diversifying labour mobility options, especially towards the EU and selected Asian destinations. Although these alternative corridors remain much smaller than migration to Russia, their strategic importance is growing. The region is therefore entering a period in which labour migration is less concentrated in a single destination model and more shaped by state-managed diversification.

Fourth, migration governance in EECA became more digitalised and more security-oriented in 2025. This was particularly visible in Russia, where new legislation and policy documents reinforced the use of digital registries, biometric controls, pre-arrival screening, and stronger enforcement against irregular stay. But similar tendencies can also be observed elsewhere in the region, including the growing use of digital tools to register mobility, manage work permits, and streamline migration services. In 2026, this trend is likely to deepen. While digitalisation may improve administrative efficiency, it also raises important questions about exclusion, data protection, access to rights, and the risk that increasingly complex compliance systems may themselves generate new forms of irregularity.

Fifth, the region's economic and demographic fundamentals continue to sustain migration pressures. Despite positive growth in much of EECA in 2025, performance remained uneven and fragile. Central Asia continued to combine strong population growth and limited domestic labour absorption with heavy reliance on remittances, while several Eastern European countries faced shrinking populations, ageing societies, and persistent labour shortages. These structural imbalances are unlikely to change in 2026. As a result, migration will remain both an economic necessity and a policy challenge: a source of household income, labour market adjustment, and demographic

relief, but also a field increasingly shaped by political concerns over control, return, and national security.

Overall, 2025 showed that migration in EECA is driven by the interaction of unresolved crises and deliberate policy choices. The outlook for 2026 is therefore one of continued volatility without fundamental rupture. Large-scale displacement from Ukraine may persist or intensify depending on the course of the war. Labour migration from Central Asia is likely to remain robust, but under tighter regulation and with gradual diversification away from Russia. Host countries in the region will continue balancing inclusion with limited resources. Across EECA, governments are likely to place greater emphasis on security, digital control, and selectivity, even as their economies remain dependent on mobility.

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