



ICMPD Migration Outlook Eastern Europe and Central Asia 2023

Six migration issues to look out for in 2023
Origins, key events and priorities for Europe



The 6 things to look out for in 2023

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

1. Protracted displacement as a result of Russia's aggression against Ukraine

On Thursday, 24 February 2022, Russia invaded Ukraine. This act of aggression has caused huge loss of life and severe damage to the infrastructure, economy and environment of Ukraine, turning nearly 40% of the country's territory into a minefield. It also changed the European and global security equilibrium, with countries increasing military spending and discussions over a possible nuclear war returning to big politics. In the migration context, the war has brought an unprecedented level of forced displacement, considered the largest in the world in early 2023. Out of the estimated 14 million forcibly displaced persons, including persons forcibly transferred to Russia, close to eight million found themselves in need of protection abroad, and another six million sought refuge within Ukraine, with many facing harsh living conditions equal to a humanitarian crisis. Almost one year into fighting, Russia continues intensive attacks on Ukraine and seemingly prepares for another escalation in the coming months, while enforcing the army through mobilisation and upping the game of defence industry.

With little chance for the war to end soon, more people may be forced to leave Ukraine in the course of 2023 – anywhere between 500,000 and 4 million persons – which calls for full preparedness and careful contingency planning of the countries already hosting Ukrainian refugee populations and the international community as a whole.

2. Outward migration from Russia and its impact on the receiving EECA countries

In 2022, at least half a million Russians left the country and did not return. The first spike in departures occurred right after the invasion of Ukraine, while the second one followed the launch of the military mobilisation in September, with more people leaving the country throughout the year. Due to the closure of the EU airspace and other measures that effectively reduced the possibility of Russian citizens to enter the EU, the flows were mainly directed to EECA countries as well as Türkiye, UAE and Israel, with fewer people choosing more distant parts all over the globe. On the one hand, the receiving countries have benefitted from the arrivals in terms of capital inflows and brain gain. However, they observed political and security concerns as well as limits to institutional and infrastructure capacities to accommodate the considerable numbers of persons entering their territory.



It is expected that migration from Russia will continue in 2023. Should the Kremlin decide to mobilise more people into the Russian army, while keeping the borders open (several draft bills that may restrict border crossing have circulated in recent months), another spike in departures may occur, with people targeting the same visa-free destinations, unless countries invoke restrictions or exceed existing capacities. In 2023, one should pay attention to how Russian migration to the EECA countries, in particular Armenia, Georgia, Kazakhstan and Kyrgyzstan, affect their human capital, demography, economic and political landscape. Although routes to the EU for Russians are currently limited, the EU should also plan for the potential arrival of Russian migrants and asylum seekers, especially since the number of asylum applications lodged by Russian nationals in the EU in 2022 has already increased three-fold when compared to 2021.

3. Frictions and developments in other regional hotspots as possible migration drivers

The severity of Russia's invasion of Ukraine has in part overshadowed other regional hotspots. In 2023, decision-makers should not neglect the vulnerability of Moldova and the issue of Transnistria, the Armenia-Azerbaijan relations as well as persisting tensions in Central Asia (border clashes between Kyrgyzstan and Tajikistan resulting in relatively unnoticed internal displacement of tens of thousands, separatist tendencies in Gorno-Badakhshan Autonomous Region in Tajikistan, or independence ambitions of the Republic of Karakalpakstan in Uzbekistan). The proximity of Central Asia to Afghanistan will continue having an impact on the former, either through inflows of Afghan refugees or via heightened security concerns, especially in border areas. The region will also continue facing adverse effects of climate change, in particular in terms of access to water or natural disasters. These developments represent potential migration drivers and require appropriate attention in 2023.

4. Host countries' efforts to integrate Ukrainian refugees of war into local labour markets, while respecting possibilities for their return and reintegration in Ukraine

The Ukrainian refugees of war who arrived in 2022 will start entering the labour market more strongly in 2023. The supply of the Ukrainian labour force will tackle some of the host countries' labour shortages and benefit their ageing and shrinking populations. However, positive labour market outcomes require targeted support in the areas of language training, skills recognition and on-the-job training, but not less so childcare, given that arrivals consisted mainly of women and children. The unknown duration of the war should not prevent a discussion on the post-temporary protection strategies within the host countries, which, in coordination with the Ukrainian authorities, should equally develop measures that will support the return and reintegration of Ukrainians. As specified in Ukraine's National Recovery Plan presented in mid-2022, Ukraine sees the return of own citizens as vital to rebuilding the country once hostilities end. Moreover, the recovery of the country will also



require a foreign labour force, which could be sourced from Central Asian countries, interested in diversification of labour migration destinations. How far such ‘dual intent’ measures will materialise in 2023 is yet to be seen.

5. Signs of the changing labour migration landscape of the EECA region

Similar to previous years, in 2022, Russia remained an important labour market for Central Asian migrants and will likely continue attracting them in 2023. At the same time, Russia’s economy, which thus far withstood international sanctions, is starting to slow down. Migrants for whom economic considerations are particularly important may vote with their feet and look for alternative destinations since returning home where jobs are scarce is not a viable option. In 2022, Kazakhstan reportedly attracted more labour migrants from Central Asia. The attractiveness of Türkiye also shows signs of growth over recent years. Moreover, Türkiye will require labour force to reconstruct the areas destroyed by a devastating February 2023 earthquake. Meanwhile, Uzbekistan continued working on the diversification of destinations for labour migration and concluded a bilateral agreement with Israel, while negotiating with Portugal, the UK and Saudi Arabia. In addition, in 2022, the UK allocated up to 40,000 six-month visas for workers from Eastern Europe and post-Soviet countries. As more receiving countries are starting to show interest in Central Asian workers, the competition over human resources is expected to grow, while the role of Russia as a regional magnet may decline in the long term. In 2023, it will be important for the countries in the EECA region and the destination countries of EECA workers to closely follow these developments and to accompany increasing labour mobility with corresponding agreements and steering mechanisms for the benefit of all sides involved.

6. Labour migration from the EECA countries to the EU

Over the past years, the EU has been an important destination for EECA labour migrants, primarily for nationals of Ukraine, Georgia, Moldova, Belarus and Russia, with both flows and stocks continuously growing. Within the EU, Poland and Italy represented the most popular destinations among EECA labour migrants. It remains to be seen whether the fallout of the war in Ukraine has a lasting impact on labour migration dynamics from the region towards the EU. In 2023, it will be important to monitor whether labour migration trends from Moldova, Georgia and Belarus to the EU are disrupted by the large inflows of Ukrainian nationals into the EU labour market and a corresponding oversupply of the labour force. Such disruptions would certainly have a negative impact on households in those countries that depend on migrant remittances and increase emigration pressures towards other world regions or irregular migration patterns towards the EU.

Introduction

The Regional Migration Outlook for Eastern Europe and Central Asia (EECA) presents an analysis of the key events and trends that shaped migration in the EECA region in 2022. Simultaneously, it offers a cautious outlook into areas and issues that may affect migration and mobility to, within and from the EECA in 2023. In a non-exhaustive way, the publication addresses developments in the twelve EECA countries (based on ICMPD's regional division) – Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Russia, Tajikistan, Turkmenistan, Ukraine and Uzbekistan. The analysis is based on ICMPD's regional expertise and desk research from official and public data sources.

In many ways, 2022 will be remembered as a tragic and unsettling year for the EECA region that saw continued flare-ups between Armenia and Azerbaijan, a reinvigorated clash between Kyrgyzstan and Tajikistan and several protests in Central Asia, all of which led to numerous civilian deaths and increased regional displacement. Yet, Russia's full-fledged invasion of Ukraine represented a major development that seemed unthinkable up until 24 February 2022 despite all signs and warnings observed since the annexation of Crimea in 2014. The invasion rapidly triggered mass displacement within and beyond Ukraine's international borders, turning neighbouring countries and EU Member States into the main harbour for millions of persons fleeing the conflict zones. The war, solidified by political repressions, sparked considerable outward migration from Russia to virtually all EECA countries and further abroad. Moreover, the war has already left a long-lasting footprint on the entire region, affecting its economic, political, demographic and social layers, and will define the way forward in the years to come.

Given the significance of the war in Ukraine for the whole region, it lies as a main binding point through the entire Regional Migration Outlook 2023 for Eastern Europe and Central Asia.

In Focus

This section looks at regional migration through a specific prism, with the analysis covering additional political, economic and environmental developments that affected migration directions, flows and scope.

Ukraine

On 24 February 2022, Russia launched an unprovoked act of military aggression against Ukraine, triggering an unprecedented massive displacement, considered the largest in the world in early 2023. **Almost a third of the entire population of Ukraine became forcibly displaced.** By mid-January 2023, close to eight million Ukrainians have fled the country, mostly women and children, escaping to primarily neighbouring and EU countries, and more than six million have sought refuge within Ukraine.

Recording a speedy arrival of millions of people fleeing hostilities in Ukraine, on 4 March 2022, the European Union activated the Temporary Protection Directive for the first time in its history, which provided displaced persons immediate access to protection, accommodation, medical care, employment and education. By mid-January 2023, close to five million Ukrainians had registered for

temporary protection in Europe, foremost in Poland (31.6% or 1,563,386 persons), Germany (20.7% or 1,021,667 persons), and the Czech Republic (9.7% or 477,614 persons).

According to UNHCR, Russia has recorded over 2.8 million Ukrainians crossing the border, however, reports claim that approximately 1.6 million Ukrainians have been illegally interrogated and forcibly deported, with Russia denying the claims. Human rights defenders have confirmed forced transfers, deportations, and the filtration process of Ukrainian civilians, mainly from Mariupol and the Kharkiv region, an act prohibited under international humanitarian law. The exact number of Ukrainian civilians who have been relocated to Russia (voluntarily or not) is unknown, and many of these families, especially the undocumented ones, including newborns and children, cannot obtain proper documentation to leave Russia.

Russia's attacks on critical infrastructure, which started in October and destroyed 50% of the energy sector, have put immense strains on the Ukrainian society. An estimated 18 million Ukrainians are in urgent need of humanitarian support inside the country and the Ukrainian economy is forecasted to shrink by 40% in 2022. Analysts expect moderate economic growth in 2023 but see no possibility for a return to pre-war GDP levels. Beyond the devastating economic impact, the war has already caused environmental damage, estimated at over 37 Billion USD. Furthermore, military intervention threatens the biodiversity of Ukraine. Smoke and fumes caused by shelling have a serious impact on air quality. Massive forest fires and attacks on fuel and industrial facilities caused toxic chemicals to leach into rivers and ground waters. Moreover, land mines, cluster munitions, and other explosive remnants of war pollute water with metals and toxic materials, leading to chronic health risks. The magnitude of explosive hazard contamination may prevent people to return to liberated territories and even force more people to leave.

Through a political prism, the war has strengthened European aspirations of the Ukrainian population, which have been widespread before and became ever more pronounced after 24 February.¹ As a result, the country submitted a formal application for EU membership, which the European Commission approved in June 2022, thereby granting Ukraine EU candidate status.

While the Ukrainian forces have made significant progress on the battlefield, the war currently has no end in sight and may turn into a protracted conflict, with unpredictable consequences for the country, its people and the entire region, or even the world. **Long-term or protracted displacement** as well as further **outflow of people** from Ukraine remains a realistic scenario for 2023. Against the backdrop of the damage caused by the war, with many forcibly displaced Ukrainians wanting to return (in fact, a considerable number have already returned), one cannot exclude the risk of massive "brain and hands drain" amid increasing global competition for human capital and labour force demands in host countries with ageing populations to vitalise their economies. On the other hand, given that Europe is facing massive inflation and increased costs of living as well as expecting a new wave of displacement from Ukraine, the public sentiment in the host societies, which to date provided immense support to

¹ A public survey conducted in March–April 2022 (excludes Crimea, Donetsk, and Luhansk oblasts) revealed that 80% of Ukrainians have a strong desire to join the EU, showing a steady increase of approval compared to 68% in February 2022.

Ukrainian refugees of war, may change and some anti-immigrant rhetoric may fester. In this vein, coordination and cooperation with the European partners concerning the design and implementation of labour market integration and other inclusion measures for Ukrainian displaced persons remains critical. The current discussion regarding the future of temporary protection for displaced Ukrainians revolves around a “dual intent” concept, which facilitates the development of skills that allow economic participation in the host society and, at the same time, enhances the prospects for successful return and reintegration to enable fast recovery of Ukraine. The search for such durable solutions will be observed in 2023.

A regional perspective on Russia’s invasion of Ukraine

Russia’s invasion of Ukraine has cast a long shadow on the EECA countries, with many having to walk a careful diplomatic tightrope given the solid regional interdependence in economic, political and social terms. The countries experienced not only vast economic ramifications resulting from the invasion and the secondary effects of the sanctions imposed on Russia, but also had to face the sudden inflow of thousands of forcibly displaced Ukrainians as well as thousands of Russian nationals who feared military mobilisation, persecution and economic downfall in Russia.

Within the EECA, **the Republic of Moldova**, Ukraine’s direct neighbour, has taken a vital role as a host and transit country, recording over 750,000 border-crossings and over 100,000 individual refugees from Ukraine between the end of February 2022 and early January 2023. On 24 February 2022, the country declared a state of emergency, which also governs migration flows, and started to work on developing a national temporary protection scheme to provide displaced Ukrainians with easier access to services, accommodation and the labour market, which was adopted in January 2023. In the days following the Russian invasion, Moldova joined Ukraine in its aspiration towards European Union membership by applying for EU candidate country status, which was granted on 23 June 2022. With Moldova moving closer to the EU, the issue of Transnistria re-emerged, a frozen conflict since the 1991-1992 era, following the fall of the Soviet Union, and a notorious hotspot in the area for smuggling, human trafficking, and money laundering. Possible military escalation in Transnistria and aggression towards Moldova will jeopardise not only the security of the country but also lead to forced displacement of its population and secondary displacement of Ukrainians who found refuge in Moldova.

Following Ukraine and Moldova’s footsteps, **Georgia** has also applied for EU membership, however, the European Commission recommended addressing a set of priorities before granting the candidate status. Georgian civil society has demonstrated strong support for Ukraine and its population. The country is currently hosting slightly more than 25,000 Ukrainian displaced persons, who can enter visa-free, many of them entering Georgia by transiting through Russia, originally fleeing from the eastern parts of Ukraine, such as Mariupol and Kharkiv. Some of them have been forcibly transferred to Russia before moving to Georgia and lack identity documents that would allow relocating to other countries.

At the same time, the Georgian government has also allowed Russian citizens to enter its territory. In line with the existing policy, Russian nationals can enter Georgia without a visa and stay in the country

for one year without registering, and considering Georgia's moderate cost of living, makes adjustment not complicated. Following the military mobilisation announced by the Kremlin in September 2022, a large number of Russian citizens have crossed the border to Georgia. While the exact number is unknown, approximately 60,000 Russians remained in Georgia by the end of 2022. Considering Georgia's turbulent history with Russia – in particular, Russia's attack on Georgia in 2008 – many Georgians are wary of the large number of Russian nationals residing in the country, fearing Kremlin's pretext for invasion as protection of its citizens. Both Georgia and Moldova had concerns regarding a possible spillover of the armed conflict to their territories, however, it seems unlikely that Russia has sufficient resources to start another military campaign while it is at war with Ukraine.

Russia

Two distinct spikes in departures of Russian citizens occurred in 2022. The first one followed Russia's invasion of Ukraine in February 2022 and featured many political activists, journalists, scientists, artists, entrepreneurs and Russia's tech elite. The reasons for people leaving Russia vary, however, most were triggered by the increasing political pressure, including the adoption of legislation that outlawed anti-war activities and criticism of the military and its leadership.² In addition, many feared the impact of tough international economic sanctions (over 13,000 sanctions by mid-January 2023) as well as possible conscription into the army and the closure of borders. This flow also included employees of international and Russian businesses, in particular the IT sector, which have suspended operations in Russia and relocated to other countries (such as the South Caucasus, Central Asia and the Western Balkans, i.e. Serbia and Montenegro). The second and more prominent spike followed the announced partial military mobilisation on 21 September 2022 that forced mostly male citizens, potentially subject to the draft, to flee the country nearly overnight, often joined by their family members. The mobilisation also became a solid push factor for those hesitant to leave until then as well as Central Asian labour migrants fearing conscription. In addition, more people, including Russia's most rich, left throughout the year.

Given the lack of robust and comparable data, **the real number of people who left Russia in 2022 and did not return is unknown**. Available Russian data provides only a relative and presumably distorted picture³. Nonetheless, the existing data confirms a record number of over 584,000 persons, both Russian and longer-term foreign residents, leaving the country in January-October 2022. A majority of those who left, approximately 89% of the persons, went to EECA countries (including an estimated 107,000 to Ukraine, 85,000 to Tajikistan, 62,000 to Armenia, 61,000 to Kazakhstan, 60,000 to Kyrgyzstan, 55,000 to Uzbekistan). For the first time in a decade, Russia's net migration was negative from all EECA countries but Tajikistan, the inflow from which largely outbalanced the overall outflow.

² For example, Federal Law no. 32-FZ of 4 March 2022 and Federal Law no. 63-FZ of 25 March 2022 "On Amendments to the Criminal Code of the Russian Federation and the Criminal Procedure Code of the Russian Federation"; Federal Law 255-FZ of 14 July 2022 "On the Control of Activities of Persons under Foreign Influence", and others.

³ Due to specific COVID-related conditions that extended the duration of stay of foreigners in Russia until the end of 2021, the statistics registered their outflow over the first half of 2022. Moreover, the data traces (de)registration of both Russian and foreign residents who resided in Russia for over 9 months, but (1) many Russian citizens leave the country without deregistering and (2) deregistration appears automatically for foreigners.

Several hundred thousand to a million Russians⁴ are believed to have left the country and not returned in 2022, **with half a million being an average estimate**. Approximately one-third of them left in spring-summer, and two-thirds left in autumn. The large outward migration is indirectly confirmed by the record outflow of financial capital, estimated by Russia's Central Bank at 251 billion USD in 2022 (14% of the country's GDP). Furthermore, Russians transferred three trillion roubles (42 billion USD) to foreign deposits in January-September 2022, while in previous years the figure stood at approximately 380 billion roubles per annum. In mid-December, Russia's Minister of Digital Development, Communications and Mass Communications stated that some 100,000 of Russia's IT specialists left and did not return in 2022. More importantly, the increased outward migration in 2022 has been mentioned in the recent bill on amending Russia's Migration Policy Concept for 2019-2025 (pending adoption in early February 2023).

Some of the most prominent destinations among Russians leaving in 2022 included visa-free Georgia, Türkiye, Kazakhstan, Armenia, Serbia, Kyrgyzstan, Uzbekistan, Azerbaijan, Tajikistan, Israel, the UAE (visa can be obtained upon arrival) and Mongolia but some Russians have travelled as far as Egypt, India, the US and Latin America (i.e. Argentina). Within the EU, the Baltic States, Finland, Greece and Bulgaria are the most popular destinations. Out of the listed countries, Türkiye, Serbia, Georgia and Kazakhstan are important countries of transit, with the first two operating direct flights to and from Russia while the latter two allowing entry by land. In particular, Kazakhstan shares several border-crossing points at its 7.600 km border with Russia, making it a perfect transit country *en route* to the rest of Central Asia and further afar. Moreover, as part of the Eurasian Economic Union, Kazakhstan, along with Armenia, Belarus and Kyrgyzstan allow entry to Russian citizens with national IDs, an important factor, given that only 30% of the Russian population possess international passports.

In the likelihood of an additional wave of military mobilisation, another spike in departures to the same visa-free destinations can be expected unless these countries invoke visa restrictions or Russia closes its borders. Otherwise, migration from Russia is likely to continue steadily throughout 2023 – presumably at around 100,000 Russian nationals per year⁵.

Central Asia

Migration in Central Asia remains affected by pre-existing drivers, foremost by economic vulnerabilities, underemployment of the growing and predominantly young populations, proximity to Afghanistan, intra-regional conflicts and climate change. In 2022, these factors were compounded by Russia's war in Ukraine and the resulting political and economic fallout leading to greater uncertainty across Central Asia.

In 2022, Central Asian states saw the **biggest influx of Russian migrants** since their independence. **Kazakhstan** became one of the main destinations for Russians fleeing mobilisation. Estimates show that more than 200,000 Russians, mostly young men, arrived to Kazakhstan over a period of two weeks

⁴All estimates that are available at the time of writing are used exclusively to illustrate the trend. At this stage, the flow should be considered as temporary outward migration rather than emigration, as defined by the UN.

⁵ Estimation is based on the historic data of the Russian Statistical Service.

in late September-early October 2022. According to the Ministry of Labour and Social Protection of Kazakhstan, the total number of Russian nationals reached approximately 298,000 by the end of 2022. Moreover, the Prime Minister of Kazakhstan announced the country's intention to host some 250 international companies that ceased business in Russia, encouraging the government to create a friendly business environment for foreign investors. The same trend on business relocation has been observed in **Kyrgyzstan**. Reportedly, over 50 companies from Russia and Belarus registered in the country, with many moving families and employees, thus, strengthening the overall economy of Kyrgyzstan. For Kyrgyzstan, a boost in Russian arrivals contributed positively to the economy. While no exact data is available yet, both **Uzbekistan and Tajikistan** saw an inflow of Russians fleeing the draft. In Uzbekistan, this assumption is indirectly supported by the remittances data, where money transfers from Russia to Uzbekistan have increased from 54.1% during the pre-war period to 80.0% in 2022.

Furthermore, **Central Asian labour migrants** are likely to experience challenges as the war in Ukraine progresses. Outward labour migration and remittances provide a lifeline to Central Asian populations. Similar to previous years, in 2022 Russia remained an important labour market for Central Asian migrants and will likely continue attracting them in 2023, given the expected acute shortages in Russia and socioeconomic push factors in home countries. This is particularly true for migrants from Tajikistan who have few real alternatives but the Russian labour market. At the same time, Russia's economy, which thus far withstood the tough international sanctions, is starting to slow down. Migrants for whom economic considerations are particularly important may vote with their feet and look for alternative destinations since returning home where jobs are scarce is not a viable option. This will be a serious challenge for the national economies, particularly for Tajikistan and Kyrgyzstan, where remittances constitute 32% and 31% of GDP respectively, making them the top fourth and fifth countries globally depending on migrants' money transfers. At the onset of Russia's invasion of Ukraine, the rapid devaluation of the rouble and the fear of conscription into the Russian army⁶ motivated a certain share of Central Asian migrants to leave, however, people eventually returned in the second and the third quarters of the year as Russia's economic outlook improved.

The **situation in Afghanistan**, following the Taliban takeover in August 2021, continues to reverberate in Central Asia through the security prism. In 2021, all five Central Asian countries generally aligned in refusing to host refugees from Afghanistan, but some limited number of Afghans continued to flicker through the borders of Tajikistan, Uzbekistan and Turkmenistan – all neighbouring Afghanistan. In 2022, the three countries opened their borders but only to Afghan passport and visa holders. As a result, Turkmenistan and Uzbekistan have not reported an influx of new arrivals from Afghanistan in 2022. Meanwhile, close to 7,000 Afghan refugees and asylum-seekers remain in Tajikistan, out of which 5,710 arrived since August 2021. The precise number of arrivals is estimated to be higher but reliable and up-to-date data is not available. In 2022, the deportation of Afghans from Tajikistan was of concern to UNHCR and attracted media attention, with more Afghan nationals considered

⁶ The growing number of Central Asian migrants have naturalised in Russia in recent years. In particular, over 200,000 Tajiks have received Russian citizenship in the past five years. In addition, in 2022, Moscow has adopted new legislation allowing foreigners and migrants residing in Russia to naturalize if they participate in military activities in Ukraine for a year.

vulnerable to forced return. Notably, the proximity to Afghanistan in addition to regional insecurity drives both internal and international migration from Tajikistan's border regions. Tajik experts note fear-induced movements of Tajik nationals between Russia and Tajikistan, concerned with the security situation in neighbouring Afghanistan as well as possible conscription into the Russian army.

Another challenge for the region is the reoccurring fighting between **Kyrgyzstan and Tajikistan**, which requires appropriate attention in 2023. In mid-September 2022, the violent flare-up between the two countries resulted in roughly 100 dead on both sides and over 140,000 Kyrgyz displaced in the border area near its southern region of Batken. The poorly demarcated borders in the Fergana Valley, where Kyrgyzstan, Tajikistan and Uzbekistan intersect, are part of the reason for the reoccurring confrontation, in addition to lack of access to water and land resources. In relative terms, this conflict is relevant to the **migration and climate change** nexus.

Migration trends in the region

This section includes key migration trends observed in the EECA region in 2022, mainly shaped by the Russian aggression against Ukraine, the resulting mass displacement and related political and economic developments in the region. The current situation makes forecasts of future migration trends highly uncertain given the volatile security, political and economic situation in Eastern Europe and Central Asia.

Structural drivers of migration in the region: economic ramifications and demographic outcomes

While the EU was mainly affected by the war-induced displacement of Ukrainians, migration from Russia had a strong impact on the South Caucasus (mainly Armenia and Georgia) and Central Asia. Not only were the main trajectories of Russian migration directed to the neighbouring countries in the region, but also many labour migrants from Central Asia considered returning home.

Georgia and Armenia registered unexpected economic growth, in parallel with rising inflation. Close to 20% of Armenia's GDP benefited from the remittances in 2022, with 67% of money transfers coming from Russia (compared to 46.6% in the pre-war period). While inflation in Georgia has hit a record 11.8%, with the annual inflation reaching 10.4 % in 2022, its economy has also benefitted from the inflow of Russian migrants. According to the National Statistics Office of Georgia, the real GDP growth reached 10.1 % in 2022. The IMF expects that both economic growth and inflation will slow down in 2023. An overall negative fallout of the war on the economy will impact **Azerbaijan**, including reduced remittances and challenges with imports with its trade partner Russia.

Moldova remains among the top countries by share of remittances in the state's economy, estimated at 15% of its GDP in 2022. Even though remittances from Russia to Moldova are not significant, the war in Ukraine may still affect the overall flow of migrants' money transfers. The presence of many Ukrainian displaced persons in Europe with access to employment may also complicate labour

migration from Moldova. Moreover, Russia has recently used energy as a weapon against Moldova, providing less than half of the natural gas it owes the country, causing a steep rise in gas prices.

Tajikistan is one of the most affected countries following the Russian invasion of Ukraine due to its strong dependence on Russia in terms of economy, security and trade. Furthermore, the country heavily depends on remittances from Tajik labour migrants working in Russia as one of the only ways of survival for many families. **Kyrgyzstan** has also been affected by an aggravating energy crisis, mainly due to the sanctions, with the economy of Kyrgyzstan being very much dependent on Russia and Kazakhstan. The challenges for Kyrgyzstan concern decreased revenues from labour migration in Russia and increased unemployment. Reports note that the country may even face one of the worst economic crises since the fall of the Soviet Union.

Overall, **economic challenges** across the region will be manifested by strengthening the national currency, thus, decreasing the competitiveness of national economies and increasing inflation and poverty levels. The arrival of newcomers and the potential return of own labour migrants increases pressure on national labour markets, real estate prices, social and health protection infrastructure, in particular, in the traditional migrant-sending countries of Central Asia. In 2023, economic factors may be the most significant for migration-related developments in the EECA region. The impact of unprecedented sanctions imposed on Russia will become more tangible in national economies. For instance, **Belarusian** economy depends on Russia entirely and will feel the full impact of the sanctions. Inflation, declining investments and lower remittances will depress domestic demand and affect real incomes. Finally, the economic downturn in Ukraine will continue, though the national economy is showing signs of adjustment to the conditions of war. Considering the economically-driven migration pre-dominant in the region in recent years, the economic recession will have an impact on migration as well. Therefore, it will be important to continue monitoring the migration potential of the countries in the region as well as the complementary migration destinations and corridors.

The **demographic trends** in the EECA region did not change dramatically over the last decade. While the five Central Asian states and Azerbaijan can be characterised with predominantly young and growing populations, all other countries in the region are facing a steady demographic decline and decreasing labour force. For many years, the Ukrainian population was shrinking fast but Russia's aggression has further accelerated this trend. Some of the externally displaced persons may not return to Ukraine after the war. Since many of them left with young children, the return of these migrants will also depend on how well children integrate into the educational systems in the countries of destination. Experts estimate a drastic fall in population, between 17% and 33%, accompanied by continued ageing and a decrease in fertility. A grave population decline is also expected in Russia, predominantly due to emigration, the war and a declining birth rate. For many years, migration represented the main component of population growth in Russia, while the fertility rate has long remained well below replacement level. As more migrants hesitate to choose Russia as a destination, its population will continue to decline, even without including the potential impact of the war and emigration.

Forced displacement and international protection

The Russian aggression against **Ukraine** caused unprecedented displacement of the Ukrainian population within and outside Ukraine’s international borders. More than 4.9 million Ukrainians have registered for temporary protection (or similar national protection schemes) in Europe, which provided them with immediate access to protection, job markets and specific support measures in the areas of education, accommodation and health services. Within the EU, Poland and Germany host the majority of displaced Ukrainians (1,563,386 and 1,021,667 persons respectively). Outside the EU, a significant number of Ukrainian refugees has registered in Moldova (102,283) and Türkiye (88,545). According to UNHCR, 2,852,395 people from Ukraine were displaced to Russia. Russian media sources claim that this number is even higher. A considerable number of Ukrainians have returned to their home country following the withdrawal of Russia’s forces from the north and northeast in March. However, continued Russian attacks on critical infrastructure of the country in addition to the general security, humanitarian and economic situation in Ukraine may be a reason for more people to flee the country in 2023, despite the profound resilience demonstrated by the Ukrainian people.

UNHCR data (*see Table 1*) demonstrates a potential increase in the number of asylum applications in 2022 submitted by the citizens of other EECA countries, with the exception of Moldova. The majority of EECA nationals seek asylum in the EU or the US. Within the EU, Germany is by far the most popular destination among EECA asylum seekers, followed by France, Sweden and Poland.

Table 1. UNHCR data on asylum applications submitted by the citizens of EECA countries, except Ukraine

COUNTRY	2019	2020	2021	First 6 Months Of 2022
ARMENIA	6,766	4,201	5,573	4,588
AZERBAIJAN	4,610	2,484	2,591	2,169
BELARUS	2,452	2,042	4,674	3,826
GEORGIA	29,441	12,501	20,154	18,138
KAZAKHSTAN	4,833	2,582	1,455	1,021
KYRGYZSTAN	1,495	1,144	904	704
MOLDOVA	6,443	4,939	10,032	5,172
RUSSIA	27,730	15,925	16,903	15,805
TAJIKISTAN	1,905	1,219	1,267	1,259
TURKMENISTAN	189	177	225	334
UZBEKISTAN	2,980	2,931	2,251	2,372

Source: UNHCR Refugee Data Finder

EUROSTAT data confirms the increase of asylum applications filed by **Russian nationals in the EU**. While 4,395 Russians applied for asylum in the EU in 2021, three times as many (15,017) asylum applications have been registered in 2022, with 21% lodged in Germany, 14% in France and 14% in Poland. Outside Europe, the US is the most popular destination for Russian asylum seekers. The US media report that 21,763 Russians applied for asylum in the country in 2022, with as many as 3,879 people arriving in October. Many of the asylum seekers are detained after their arrival, and their chances of getting asylum in the US are uncertain. In the EU, Russian applicants are subject to the regular asylum procedure, i.e., each case decided upon individually, making it difficult to forecast the number of Russian applicants granted a protection status in the end.

A significant increase in asylum applications from **Georgia** was recorded by both UNHCR and EUROSTAT. According to the latter, 12,440 applications were lodged by Georgian citizens in 2021, while 25,992 applications have been submitted in 2022, mainly in France (31%), Germany (30%) and Italy (12%). According to the European Union Asylum Agency, in November 2022, Georgian citizens lodged over 3,000 asylum applications in the EU – the largest number since 2008. Moreover, Georgians have been one of the 10 main applicant groups almost every month since May 2021. In 2022, the rate of first instance positive decisions on Georgian asylum applications was at 4%, similar to previous years. Taking the low recognition rates into account, there is a strong need to reinforce both return and reintegration efforts for rejected asylum seekers in Georgia, combined with the development of more legal migration pathways to resolve this issue.

Internal displacement remains an ongoing reality for many EECA countries. Since 2014, conflict-driven displacement has been a challenge for **Ukraine** with over 800,000 internally displaced persons (IDPs) registered in 2021. Experts estimate that 16% of the population or close to seven million people were displaced internally within Ukraine due to the Russian aggression in 2022. The majority of the displaced population is female. In addition, a large number of the displaced persons are in a vulnerable situation: a third of IDP households include someone who is chronically ill, and a quarter include persons with disabilities. Nearly a third of all IDPs reported at least one secondary displacement, including those who have been displaced since 2014. The main issues of concern include the need for cash assistance, food insecurity, lack of accommodation as well as lack of non-food items such as clothes and shoes.

Internal displacement in **Georgia** dates back to the events of 1991–1993 and 2008 and still affects the lives of over 300,000 IDPs. The decades-old dispute between **Armenia and Azerbaijan** is equally affecting the lives of hundreds of thousands of displaced people in both countries. The situation deteriorated into full-scale conflict in the autumn of 2020 and resulted in roughly 7,000 soldier deaths. Since then and following a November 2020 tri-partite agreement with Azerbaijan and Armenia, Russian peacekeepers have been stationed in part of Nagorno-Karabakh that remains under Armenian control. Currently, a particular challenge represents the Lachin corridor, which connects Armenia to Nagorno-Karabakh, with the ongoing debate over it affecting the progress of the latest peace efforts initiated by the EU. On 23 January 2023, the European Council agreed to establish a civilian mission to contribute to stability in border areas – European Union Mission in Armenia (EUMA) with the initial

mandate for two years. EUMA will conduct routine patrolling and reporting on the situation, and contribute to the mediation efforts in the region.

Displacement resulting from extreme weather, the slow onset effects of climate change and water scarcity is a matter of growing concern in the region, in particular, in Central Asia. The Fergana valley, the most densely populated area in Central Asia, has history of conflict and violence. Conflicts over border demarcations have become regular events in recent years, mainly between **Kyrgyzstan and Tajikistan**. These clashes triggered more than 70,000 displacements on both sides of the border in 2021. Nearly 137,000 people had to be evacuated in **Kyrgyzstan** due to the reoccurring border dispute, aggravated by water distribution system challenges between the Kyrgyz Republic and Tajikistan in September 2022. In addition, considering the environmental damage caused by climate change, historical disputes between farmers over water resources in Kyrgyzstan's northern province of Chui and Uzbekistan's provinces of Namangan and Surkhandarya may trigger potential displacement in the future. Within Central Asia, Tajikistan and Kyrgyzstan have laws and policies on internal displacement, but stronger provisions are needed to address and reduce challenges associated with drought and other adverse effects of climate change in this region.

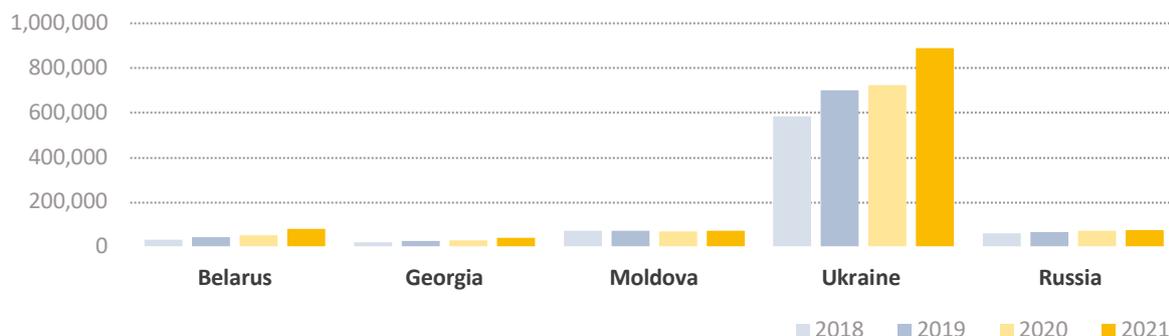
Labour migration from and within the region

In recent years, two key patterns of labour migration emerged in the EECA region: (1) migration from Ukraine, Belarus, Russia, Georgia and Moldova to the EU, and (2) migration from Central Asian countries to Russia. While traditional drivers of labour migration remain in place, Russia's war in Ukraine and its multifaceted impact on the entire EECA region is increasing the role of alternative destinations, such as Kazakhstan and Türkiye, among migrants who targeted Russia.

Labour migration of EECA nationals to the EU

Until the end of 2021, labour migration trends from EECA region to the EU remained unchanged (no data for 2022 was available at the time of writing). Compared to previous years, the number of residence permits issued to EECA citizens increased. With almost 900,000 valid permits, Ukrainian nationals continued to represent the largest group of EECA labour migrants in the EU in 2021. In relative terms, the growth was most prominent among Central Asian migrants, ranging between 23% and 64%, albeit in absolute terms they held approximately 2% of all valid residence permits for work reasons issued to EECA nationals. As in the previous years, the number of Belarusian migrant workers continued to grow, both in flow and stock. The political situation in Belarus following the protests in 2020 may have additionally solidified the trend. Migration flows from Moldova and Georgia reached their pre-pandemic numbers, meanwhile, flows from Russia increased two-fold, equally showing a lasting trend. Similar to 2020, Poland and Italy remained the most popular destination among EECA labour migrants.

Figure 1. All valid residence permits issued for remunerated activities in the EU to citizens of selected EECA countries between 2018 and 2021



Source: Eurostat

As soon as the data for 2022 is available, it will be worthwhile to take a closer look at labour migration patterns to see whether the fallout of the war in Ukraine has a lasting impact on labour migration dynamics from the region towards the EU. Namely, to see if labour migration trends from Moldova, Georgia and Belarus to the EU are disrupted by the large inflows of Ukrainian nationals into the EU labour market and a corresponding oversupply of labour force. Certainly, Ukrainian nationals who have registered for temporary protection in the EU may partly address the ever-growing need for the labour force in the EU. The Union's labour force was expected to increase by 0.5% in 2022, particularly in the Czech Republic (2.2%) and Poland (2.1%), both countries hosting over two million Ukrainians under temporary protection. Most Ukrainians entering the labour market are highly educated and employed in the service industry. As the war drags on and people steadily settle in their host countries (temporarily or not), more Ukrainians will start entering the EU labour market. Secondary movements between EU member states may also play a role in the distribution of the Ukrainian labour force across EU markets, either if such an agreement is reached between the member states or Ukrainian nationals under temporary protection move to another EU country on their own account. At the same time, as human capital remains a key asset for the restoration and recovery of Ukraine, and 2023 will see an increased debate on who will return, how many will stay abroad and what migration policies should be adopted in Ukraine to help ease domestic labour shortages. Moreover, as specified in Ukraine's National Recovery Plan presented in mid-2022, the recovery of the country will also require foreign labour force, which could be sourced from Central Asian countries, interested in diversification of labour migration destinations.

Labour migration to Russia and alternative labour migration destinations

Labour migration to Russia originates primarily from Central Asia, particularly from Uzbekistan, Kyrgyzstan and Tajikistan. Against the backdrop of likely biases in Russian statistics in 2021 and 2022, demonstrating both unusual outflows and extraordinarily high inflow of labour migrants (e.g., 4.4 million Uzbek migrants in January-September 2022 vs 3 million in January-September 2021), experts

agree that annually around 3.5-4 million Central Asian labour migrants came to Russia during this period. Most of them work in low-skilled occupations, such as construction, delivery, transportation and agriculture. Following Russia's invasion of Ukraine, labour migrants were quick to feel the economic sanctions, which devaluated the rouble and consequently the currencies of Central Asian countries, shrinking remittances. The rapid closure of international and Russian businesses led to job losses. Moreover, many migrants were concerned over possible conscription into the Russian army. There are also reports on the employment of Tajik migrants in Russia on the construction sites in the occupied territories of Ukraine. As a result, labour migrants started leaving Russia. In the first quarter of 2022, 60,000 Tajik and 133,000 Uzbek migrants returned home. As soon as the economic outlook in Russia improved, labour migrants started returning. In general, experts conclude that the 2022 flow remained strong but the long-term outlook is uncertain. In addition, in October President Putin announced that Russia's current migration policy concept will be reviewed. Some observers expect that this will further strengthen migration control, thus, the number of labour migrants in Russia will further decrease.

Considering these recent developments, reports confirm that Kazakhstan attracted more labour migrants from Central Asia in 2022. Through its quota system, Kazakhstan attracts a minor number of migrants, which did not exceed 14,000 in December 2022, mostly nationals of China, India and Türkiye. Meanwhile, a considerably larger share of labour migrants obtain work permits. The number of such migrants – predominantly from Uzbekistan – grew remarkably from 141,000 in 2015 to 531,000 in 2019. Türkiye is another popular destination for Central Asia workers and its attractiveness is growing. In early 2023, some 250,000 Turkmen and 130,000 Uzbek citizens had various types of permits in Türkiye. The precise number of Central Asian labour migrants in both Kazakhstan and Türkiye are likely higher, as many work informally or in a hybrid form that combines shuffle trade and short-term jobs. Finally, a new development is the increased migrant flow to the United Kingdom, which started recruiting Central Asian seasonal workers to compensate for the severe shortage of farmers after Brexit. In 2022, the UK allocated up to 40,000 six-month visas to workers from Eastern Europe and post-Soviet countries.

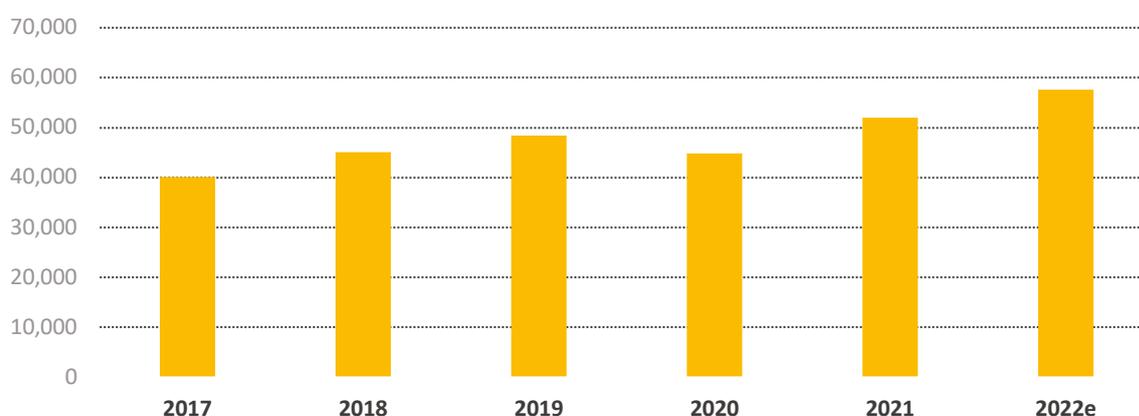
The diversification of destinations for labour migration remains strong, with Uzbekistan leading the way. Having previously concluded agreements on external labour migration with South Korea, Russia, Japan, UAE, Kazakhstan, and Türkiye, in 2022, Uzbekistan signed another agreement with Israel and continued negotiating with Portugal, the UK and Saudi Arabia. In addition, Russia removed the quota cup for Uzbek labour migrants under the Russia-Uzbekistan bilateral agreement on organised recruitment of labour force. Overall, as more receiving countries are starting to show interest in Central Asian workers, the competition over human resources is expected to grow, while the role of Russia as a regional magnet may decline in the long-term.

Remittances

The EECA region marks remittance inflows as the largest source of external financing. For some countries, notably Kyrgyzstan and Tajikistan, remittances constitute a large portion of GDP (31.3% and

32.1% respectively) providing a financial safety net for many families and reducing poverty. Unlike private capital flows, remittances tend to be resilient during crises. In 2022, despite the global turmoil, remittances to the EECA region grew by 11%, amounting to 57 billion USD after falling by 8.4% due to the pandemic. Rising oil prices and appreciation of the rouble against the US dollar contributed to this end as well as the relocation of Russian businesses and considerable migration from Russia to other EECA countries, including those who came to obtain credit or debit cards and place their hard currency assets.

Figure 2. Migrant remittance inflows to the EECA region (USD million), with estimates for 2022



Source: World Bank

Compared to 2021, remittances across the region showed different dynamics in 2022. Notably, remittances to Russia dropped by 40% following international sanctions on Russia's banking system. Transfers to Armenia increased two-fold and those to Uzbekistan by 3.5 times, amounting to approximately 20% of GDP in both countries. Remittances to Georgia, Azerbaijan, Kazakhstan and Belarus increased by 55%, 40%, 19% and 18% respectively. Meanwhile, Moldova and Ukraine (4% and 2% respectively) had the lowest increases across the region, which is lower than projected earlier. A new development represented an increased flow of remittances from Kyrgyzstan to Georgia (USD 1.8 million in 2021 vs USD 18.1 million in 2022). In 2023, remittance receipts are projected to moderate to 4.2% growth due to a softer outlook for major remittance-sending countries.

Irregular migration and return

In 2021-2022, **EECA emerged as the region of transit for non-EECA irregular migrants** with Belarus' attempts to push third-country nationals – mostly from Iraq, Afghanistan and Syria – towards the EU borders. As a result, Frontex recorded over 8,000 irregular migrants on EU's eastern land border, a 15-time spike compared to the previous year. In 2022, the number of detections totalled 6,127, which still significantly exceeds arrivals recorded before 2021. Human rights organisations and media continue reporting harsh treatment and even deaths of migrants at the EU-Belarus border in 2023. Russia's recent announcement to launch flights from North Africa and the Middle East to its exclave of

Kaliningrad, bordering Poland and Lithuania, represents a worrisome development. New attempts of ‘state-facilitated smuggling’ via the EECA region cannot be ruled out in 2023.

Among EECA nationals staying irregularly in the EU, Moldovans, Ukrainians and Georgians were detected most often in 2021, a trend that was already observed in 2020. Moreover, for the second year in a row, the number of Moldovan nationals with irregular stay in the EU increased profoundly, by 50% in 2020 and by 70% in 2021, compared to the preceding year. Along with Russian and Ukrainian nationals, Moldovans represented the top three EECA nationalities refused entry in 2021; however, the overall trend was negative, with fewer refusals received in all three cases.

In terms of returns, again, Moldovans, Ukrainians and Georgians were among the top three EECA nationalities ordered to leave and returned home in 2021. The preliminary data for the first three quarters of 2022 highlight the increase of both return orders and executed returns among Georgian nationals compared to the whole of 2021. Georgia’s cooperation on readmission is assessed by the EU as excellent. In addition, the country consistently takes steps to prevent irregular migration of its own citizens to the EU, in particular, by executing additional document checks at all border points among Georgian travellers heading to the Schengen Area. The number of return orders and executed returns pertaining to Ukrainian nationals in 2022 has unsurprisingly declined. Given the ongoing war, this trend will continue in 2023 as well.

Similar to previous years, rates of return to the EECA region from Europe remain high compared to other regions of the world, ranging between 30% and 70%. However, with Belarus unilaterally suspending its readmission agreement with the EU in December 2021, cooperation has essentially stopped, which is also visible in the return rate that has declined from 71% in 2021 to 46% in the first three quarters of 2022. At the same time, the most notable increase in the return rate concerns Russian nationals. With the EU taking steps to scrutinise access to its territory to Russian nationals, including the recently suspended Visa Facilitation Agreement, irregular migration patterns of Russians will be important to observe in the coming year.

Migration policy developments

This section explores some of the relevant migration policy measures adopted by the EECA and the EU countries in response to the large-scale displacement of the Ukrainian population and the mass outward migration of Russian citizens, both representing two novel trends for the region. Such measures varied depending on the stance of foreign policy as well as the composition and size of the migration flows stemming from Ukraine and Russia and reaching particular destinations.

Policy responses to displacement from Ukraine

The Republic of Moldova has become an important host and transit country for Ukrainians fleeing the war. The country declared a state of emergency on 24 February, repeatedly extending it, a measure that allows Ukrainian citizens, their non-Ukrainian spouses and foreigners who had refugee status in Ukraine to live and work in Moldova until the state of emergency lasts. To ensure uninterrupted entry of persons fleeing Ukraine in the early days of the invasion, Moldova equally lifted documentation

requirements as well as COVID-19 restrictions and ensured that those willing can access the existing asylum procedure. On 18 January 2023, the government adopted the directive on temporary protection, which enables the registration of refugees and facilitates better access to services, including accommodation and access to the labour market. Everyone subject to temporary protection will receive it as of 1 March 2023 with the initial validity for one year. The TP status will ultimately remove the risks for persons who remain in Moldova without a refugee status to become irregular with the end of the state of emergency. Most recently, from 23 December until 1 February, Moldova simplified the border crossing for Ukrainian citizens allowing them to enter and exit the country from Romania or via the Chisinau airport using various identity documents, including electronic copies of driver's licences or military cards with expired validity. On a broader scale, Moldova set up a Crisis Management Centre, coordinating actions with various local and international actors. The EU plays an important role in financially supporting Moldova – the country with the smallest economy in Europe – with fewer resources to allocate towards the response and its vulnerability to the secondary effects of the war. Moreover, EU Member States have provided roughly 20,000 pledges to relocate people who sought refuge in Moldova.

Belarus, also bordering Ukraine, recorded the arrival of approximately 19,000 Ukrainian nationals from February to December 2022, however, since mid-April, border crossings from Ukraine to Belarus remain limited. The majority of arrivals had relatives or friends in Belarus. The country allows visa-free entry and transit through its territory to Ukrainian nationals and foreigners fleeing the war and lifted all COVID-19 restrictions at border crossing points with Ukraine. In September, **Belarus** amended the decree 'On the stay of citizens of Ukraine in the Republic of Belarus', which foresees facilitated access of Ukrainian citizens to medical care, employment, education and pensions (the latter only for Ukrainians with permanent residence). The document exempts citizens of Ukraine from paying state fees such as registering a temporary stay in Belarus or issuing a temporary residence permit.

Policies invoked by **Russia** in response to the considerable inflow of Ukrainians are by no means without controversy. Ukrainian nationals are allowed to enter Russia visa-free and even without travel documents. As of 5 March 2022, foreigners coming from the territory of Ukraine can also enter, leave and stay in Russia for 15 days without a visa. According to the presidential decree on 27 August 2022, Ukrainians can reside in Russia without limits, subject to mandatory state fingerprint registration, photographing and medical examination, but need to apply for a temporary stay and undergo mentioned procedures within the 90-day visa-free stay. They can also work in Russia without a work permit. Ukrainian nationals who apply for asylum in Russia are mostly granted temporary protection. Another option beyond temporary protection or temporary residency is to naturalise. Over the past several years, Russia has been simplifying the path to its citizenship. In 2022, the law was further simplified allowing all citizens of Ukraine and stateless persons who resided legally in Ukraine to follow a fast-track scheme to obtain Russian passports. This procedure does not require one to previously reside in Russia. Moreover, in December 2022, Russia's State Duma submitted a draft bill that may simplify the process of renouncing Ukrainian citizenship. In the context of war, these new provisions on Russian citizenship have been widely acknowledged as a violation of international law, with forced

‘passportisation’ clearly banned by Geneva conventions. Following Russia’s aggression in February, additional but equally unlawful practices included forced transfers of Ukrainians to Russia and their ‘filtration’ at border crossing points.

Despite **Georgia** recording fewer arrivals from Ukraine, it has simplified the entry to persons fleeing hostilities, allowing them to cross the border with or without a valid passport, accepting any other identity document, also damaged or expired. Based on the government decree adopted in August 2022 and then extended to last until May 2023, Georgia provides financial assistance to Ukrainian nationals and foreigners who permanently resided in Ukraine before the war. Such assistance replaced the previous modalities of free accommodation, including in hotels and hostels across Tbilisi. In spring 2023, most Ukrainians will exhaust the one-year visa-free stay and, unless the government of Georgia extends it, will have three options: exit Georgia via an international border and re-enter, apply for residency or seek international protection.

In October 2022, **Azerbaijan** announced the lifting of a 90-day visa-free period for Ukrainian nationals, which represents an important development for approximately 7,000 Ukrainian citizens who have found residence in Azerbaijan since the end of February.

Another South Caucasian country, **Armenia**, announced its readiness to welcome Ukrainian nationals of Armenian descent and other refugees in February. Since the flow has been minor and was mostly ethnic Armenians repatriating back to the country, which was also the case following the 2014 conflict in Ukraine, Armenia applies the existing asylum procedure and the visa-free entry and stay for up to 90 days in line with the bilateral agreement with Ukraine. The adoption of government housing programme for persons recognised as refugees, an important recent step, foresees six-month financial aid for covering accommodation costs.

Countries of **Central Asia** have not adopted specific measures targeting Ukrainian refugees of war. Similar to Armenia and Azerbaijan, flows from Ukraine to Central Asia have been limited and mainly included repatriates, people of Central Asian descent or those with family ties in these countries. In the absence of a structured state response, the support for arrivals has been coming mainly from within societies. However, media reports confirm that **Kazakhstan**, which received roughly 7,000 Ukrainians since February, issued a special B20 visa to Ukrainian nationals who exhausted their 90-day visa-free stay and have not applied for residency or asylum. B20 is a so-called force-major visa granted once for 15 days should foreigners face obstacles (i.e., flight cancellation) to leave the country within the term of their legal stay. Against this rule, migration authorities of Kazakhstan have been re-issuing such visas repeatedly within several months. Notably, Kazakhstan grants refugee status only for one year and refugees cannot execute the full set of rights.

Policy responses to outward migration from Russia

A set of visa, residence and travel restrictions applied by the EU **and its Member States** in response to Russia’s aggression on Ukraine had perhaps the most profound impact on the direction of migration flows from Russia in 2022. The closure of the EU airspace for all planes to and from Russia in February

2022 substantially reduced available options to leave the country, increased prices on air routes at least three-fold and re-routed flows to previously less popular destinations across and beyond the EECA region. The scarcity of remaining flights and their higher price tag made land travel a more viable option when it comes to non-EU destinations and the only option to enter the EU directly from Russia.

The suspension of the EU-Russia Visa Facilitation agreement on 12 September 2022 and the updated European Commission's guidelines on visa procedures and border controls for Russian citizens at the EU's external borders released on 30 September, represented another crucial step to reduce travel from Russia to the EU and ended 15-year preferential access for Russian nationals brokered in 2007.⁷ As a result, short-stay visas became less affordable, meanwhile, the EU Consulates apply a higher degree of scrutiny on visa applications, extending the period for deciding on visa applications, reassessing valid visas, deprioritising applicants travelling to the EU for non-essential travel and abstaining from issuing of multiple-entry visas. Some countries also developed specific requests for visa applicants. For example, Germany requires financial statements from banks located outside Russia. Moreover, by the end of the year, Latvia, Lithuania, Estonia, Poland, Finland and the Czech Republic had almost completely restricted border crossings for Russians with short-term Schengen visas due to higher security concerns and most of them completely stopped issuing visas for tourist purposes. Notably, in September, many Russians fleeing mobilisation frequented land border-crossing points with Finland and Estonia. Norway also suspended its visa facilitation agreement with Russia but keeps its border open – although tightened security – to Russians with valid visas. However, it is questionable whether these measures target Russia's oligarchs and decision-makers responsible for the war in Ukraine, many of whom hold multiple citizenships (mostly of Israel and Cyprus). Consequently, EU countries operating citizenship by investment programmes (the so-called 'golden visas') – e.g. Malta, Cyprus and Bulgaria – started reassessing the programmes and even withdrawing previously granted passports.

EU Member States have different approaches regarding issuing humanitarian visas and granting asylum to Russian nationals, adding another layer to the complexity of the situation. The Netherlands, Estonia, Slovakia, Latvia, Lithuania, Estonia and the Czech Republic announced that they will not grant an automatic protection status to Russian nationals fleeing from conscription. France also announced that mobilisation is not necessarily a strong enough reason to obtain an automatic protection status. At the same time, as of May 2022, the Czech Republic started running a special programme for Russian and Belarus nationals who are at risk of persecution in their countries of origin, meanwhile, Lithuania, France, Latvia and Germany issue humanitarian visas to Russians being subject to persecution. Norway has suspended the consideration of political asylum applications filed by Russian citizens, presumably working on a new procedure for processing their claims. Most other EU countries have no special humanitarian visas or programmes for Russians but Finland is considering one, while at the moment

⁷ Over the past decade, the EU countries represented some of the key destinations for Russian nationals, with the Union's Consulates in Russia issuing close to 38 million short-stay visas (around 30% of the total number) between 2012 and 2021.

accepting asylum applications submitted at its border. It is quite likely that approaches to granting asylum across the EU will vary and it remains to be seen how the case law will develop in 2023.

In comparison to the EU, **non-EU destinations** saw either limited or no policy response to the influx of Russian nationals in 2022. The vast majority of these countries, mostly part of the EECA region, have visa-free agreements with Russia, allowing its nationals to stay without a visa for anywhere between two months (Türkiye) to one year (Georgia). Countries such as **Uzbekistan** and **Kyrgyzstan**, which assess the inflow of skilled Russians more as an opportunity, developed specific programmes targeting IT specialists. Kyrgyzstan's pilot "Digital Nomad" programme, launched in August 2022, grants a work permit and a visa-free stay for one year, among other preferential policies. Uzbekistan's IT Visa, launched in April 2022, can be issued for three years and then prolonged indefinitely. Both initiatives apply to non-Russian nationals as well.

Among countries that took certain steps in the opposite direction are **Kazakhstan** and **Türkiye**. In January 2023, Kazakhstan, which saw particularly high numbers of Russian migrants in September 2022, disallowed foreigners from visa-free countries to stay on its territory without a visa beyond 90 days within 6 months, while previously they could leave and re-enter Kazakhstan and renew the 90-day term. As of 27 January 2023, such foreigners will have to apply for temporary residence indicating their purpose of stay in Kazakhstan. In Türkiye, Russians ranked first among foreigners receiving residence permits in 2022, up from the sixth place in 2021, and were the first among buyers of Turkish property in 2022 (16,300 in 2022 vs 16,200 over the previous six years). As of July 2022, Türkiye reduced the number of provinces and municipalities where foreigners can receive residency against a purchased property. Moreover, in the case of rentals, residency is granted for half a year (previously, for 1 year). Media reports claim that Türkiye is refusing residency permits to Russians, however, no official statements are available at the time of writing. Lastly, **Georgia's** President Salome Zurbishvili called for tightening conditions for Russians to stay, work, register businesses, purchase property or open Russian-language schools in Georgia.

Amid Russia's increasingly repressive legislation and the threat of military mobilisation, the demand to leave the country among Russian nationals is likely to remain high. With no end to Russia's aggressive war in sight, EU Member States will most probably continue tightening their visa and residence requirements for Russian citizens. For example, in early January 2023, Latvia considered suspending its repatriation law given the high interest among Russians. As paths to asylum may also be limited, higher irregular arrivals or stays cannot be excluded, therefore, new discussions on the EU level are highly probable. Most non-EU destinations will likely keep their doors open, but some, such as Georgia, may ultimately scrutinise entry and stay rules for Russian nationals.

Conclusions for 2023

In 2022, conflict-induced mobility made it to the forefront of migration dynamics in the region of Eastern Europe and Central Asia as a result of Russia's invasion of Ukraine. For many observers, the war in Ukraine marks a turning point in the global order that could bring even greater uncertainty. Some argue that this development dates back to the economic shocks in the aftermath of the global

financial crisis of 2008-2009, which exacerbated existing social and political tensions in many regions of the world and affected the size and dynamics of international migration as well. In case of Eastern Europe and Central Asia, one has to look even further back and take into account processes that have shaped the region over the last 30 years. The fall of the Soviet Union removed many strictures that kept ethnic tensions and national rivalries under control and gave way to what scholars have called ‘the wars of the Soviet succession’ – Nagorno-Karabakh, Transnistria, Chechnya, Abkhazia, South Ossetia and Tajikistan. Some of these conflicts convulsed and fizzled out, while others kept simmering and eventually flaring up. Russia’s aggression towards Ukraine is exceptional in its ferocity and far-reaching geopolitical impact but at the same time falls under previously observed conflict patterns in the post-Soviet area, and may not even be the last big conflict in this regard. The potential for violence in Central Asia remains high and requires due attention in 2023.

A regional migration outlook into 2023 is fraught with many uncertainties and only slim prospects of return to pre-2022 or pre-pandemic patterns. The war in Ukraine has the potential to turn into a protracted conflict, endangering the livelihoods of millions of people over prolonged time and giving little hope to the displaced Ukrainians for a timely return home. Most likely, this also implies that the displaced Ukrainians, their host countries and the Ukrainian government will have to navigate new waters, adjusting temporary modalities to more long-term solutions that first and foremost benefit the Ukrainian refugees and internally displaced. At the same time, it also implies that large-scale displacement will remain one of the key defining features of the EECA region in 2023 along with the strong economic-induced migration, which was prevalent over the past decades.

Economic ramifications of the war and its secondary effects will be felt in all 12 EECA countries, be it through rising inflation, energy crisis or increasing poverty levels. Last year, however, also exposed major geopolitical and economic disruptions, changing financial flows and “brain shift” from Russia to neighbouring countries that may yield unexpected new opportunities in 2023. As the international sanctions take grip, Russia is expected to enter recession, which will impact millions of Central Asian labour migrants coming to Russia every year to earn a living. While it can be expected that many of them will proactively look for alternative destinations, as is the case of Uzbekistan, exploring new markets that can accommodate large quantities of labour migrants from the region will not be an easy task and may take years before showing full effect. Openings in destination countries, be it inside the EU or elsewhere, that search for a new labour force to fill existing and anticipated shortages, have the potential for a better matching of growing labour demands with existing supplies in the EECA region. Related efforts, however, have to address existing mismatches in formal and practical qualifications and establish functioning systems of admission, control and return. Migration from Russia is expected to continue but Russian emigrants may face challenges with the regularisation of stay in the destination countries as refugees or in obtaining entry permits as labour migrants due to the strained relations between their home country and potential host countries.

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