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PROSPECTS FOR THE DEVELOPMENT OF LABOR MIGRATION IN CENTRAL ASIA UNDER GEOPOLITICAL TRANSFORMATION

Labor migration in Central Asia is undergoing a profound reconfiguration under the combined pressure of geopolitical shocks, economic restructuring, and the diversification of migration routes. The article asks how the region's traditional migration model – oriented overwhelmingly toward the Russian Federation – is being reshaped after 2022, and what economic, demographic, and governance implications this reconfiguration carries for the states of the region. Methodologically, it is a qualitative, comparative desk review combining comparative analysis across the Central Asian states, content analysis of scholarly and policy literature, and a descriptive review of secondary statistics from the World Bank, the International Organization for Migration, the United Kingdom Government, and the International Centre for Migration Policy Development for the period 2022–2025. Its contribution is threefold: it synthesizes fragmented recent evidence into a single analytical frame that distinguishes the region's established corridor from its emerging directions; applies that frame to a comparative reading of Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan; and derives, through an explicitly labelled qualitative scenario to 2030, a diversification-and-protection policy agenda. The picture that emerges is of a region moving from a monopolar, Russia-centred system toward a multipolar one, in which Kazakhstan consolidates as a regional hub, the European Union and the United Kingdom become structural seasonal-labor destinations, and remittance dependence, informal employment, and demographic asymmetry remain the decisive variables shaping outcomes.

Keywords: labor migration, Central Asia, migration diversification, geopolitical transformation.

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Геосаяси трансформация жағдайында Орталық Азиядағы еңбек миграциясының даму болашағы

Орталық Азиядағы еңбек миграциясы геосаяси дүрбелеңдердің, экономикалық қайта құрылымдаудың және миграция бағыттарының әртараптандырылуының қатарлас қысымы астында терең қайта құрылымдалуды бастан өткеріп отыр, сондықтан мақалада өңірдің негізінен Ресей Федерациясына бағдарланған дәстүрлі миграция моделі 2022 жылдан кейін қалай өзгеріске ұшырап жатқаны және бұл қайта құрылымдаудың өңір мемлекеттері үшін қандай экономикалық, демографиялық және басқарушылық салдарлары бар екені қарастырылады. Әдіснамалық тұрғыдан зерттеу – Орталық Азия мемлекеттері бойынша салыстырмалы талдауды, ғылыми және саяси әдебиеттің мазмұнды талдауын, сондай-ақ 2022–2025 жылдар аралығында Дүниежүзілік банктің, Халықаралық миграция ұйымының, Ұлыбритания үкіметінің және Миграция саясатын дамыту жөніндегі халықаралық орталықтың қосалқы статистикасына сипаттамалық шолуды біріктіретін сапалы, салыстырмалы кабинеттік шолу. Зерттеудің үлесі үштік сипатқа ие: үзік-үзік жиналған соңғы деректерді өңірдің қалыптасқан дәлізі мен жаңадан пайда болып жатқан бағыттарын ажыратуға мүмкіндік беретін бірыңғай талдау шеңберіне біріктіреді; осы шеңберді Қазақстан, Қырғызстан, Тәжікстан және Өзбекстанды салыстырмалы талдауға қолданады; және 2030 жылға дейінгі нақты белгіленген сапалы болжамдық сценарий негізінде әртараптандыру және қорғау саясатының күн тәртібін қалыптастырады. Нәтижелер өңірдің монополяры, Ресейге бағдарланған жүйеден мультиполяры жүйеге көшіп жатқанын көрсетеді: мұнда Қазақстан өңірлік хаб ретінде нығаяды, Еуропа Одағы мен Ұлыбритания құрылымдық маусымдық еңбек бағыттарына айналады, ал ақша аударымдарына тәуелділік, бейресми жұмыспен қамту және демографиялық асимметрия нәтижелерді қалыптастыратын шешуші айнымалылар болып қалады.

Түйін сөздер: еңбек миграциясы, Орталық Азия, миграцияның әртараптандыруы, геосаяси трансформация.

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Перспективы развития трудовой миграции в Центральной Азии в условиях геополитической трансформации

Трудовая миграция в Центральной Азии переживает глубокую перестройку под совокупным давлением геополитических потрясений, экономической реструктуризации и диверсификации миграционных маршрутов, и статья задаётся вопросом о том, как традиционная для региона модель миграции – ориентированная преимущественно на Российскую Федерацию – трансформируется после 2022 года и какие экономические, демографические и управленческие последствия эта реконфигурация несёт для государств региона. С методологической точки зрения это качественный сравнительный кабинетный обзор (desk review), сочетающий сравнительный анализ по государствам Центральной Азии, контент-анализ научной и политической литературы и описательный обзор вторичной статистики Всемирного банка, Международной организации по миграции, Правительства Великобритании и Международного центра по развитию миграционной политики за 2022–2025 годы. Вклад исследования носит тройственный характер: оно синтезирует фрагментированные новые данные в единую аналитическую рамку, позволяющую отличить сложившийся коридор региона от формирующихся новых направлений; применяет эту рамку к сравнительному анализу Казахстана, Кыргызстана, Таджикистана и Узбекистана; и на основе явно обозначенного качественного сценария до 2030 года формулирует повестку политики диверсификации и защиты трудовых мигрантов. Согласно результатам, регион переходит от монополярной, ориентированной на Россию системы к мультиполярной, в которой Казахстан закрепляется в качестве регионального хаба, Европейский союз и Великобритания становятся структурными направлениями сезонной трудовой миграции, а зависимость от денежных переводов, неформальная занятость и демографическая асимметрия остаются определяющими переменными, формирующими итоговые результаты.

Ключевые слова: трудовая миграция, Центральная Азия, диверсификация миграции, геополитические преобразования.

Introduction

Labor migration is one of the defining features of socio-economic life in Central Asia, shaping the region's demographic dynamics, employment structures, human-capital formation and macroeconomic stability. Europe and Central Asia together host roughly one hundred million migrants, about a third of the global total, and labor mobility within this space has long functioned as a central mechanism of income generation and labor-market adjustment (World Bank & KNOMAD, 2024). For the smaller economies of the region the dependence is striking: in 2024 remittances were equivalent to about 45 per cent of gross domestic product in Tajikistan – the highest ratio in the world – 24 per cent in Kyrgyzstan and 14 per cent in Uzbekistan (World Bank & KNOMAD, 2024; Migration Data Portal, 2024).

For three decades this system rested on a stable, reproducible model oriented overwhelmingly toward the Russian Federation. As late as 2023, more than 80 per cent of labor migrants from Tajikistan and Kyrgyzstan worked in Russia, while migration from Uzbekistan was somewhat more diversified,

with roughly 57 per cent directed to Russia, 15 per cent to Kazakhstan and 10 per cent to other destinations (Bossavie et al., 2024). Recent research, however, shows that this model is undergoing structural change under the influence of political, economic and institutional factors linked directly to the Russian–Ukrainian conflict, sanctions pressure and shifts in Russian migration regulation (Kadyrbek & Koblandin, 2025).

The most important driver of the current change is geopolitical instability, which since 2022 has increased uncertainty for both migrant workers and employers and prompted a reorientation of flows toward alternative destinations, notably Kazakhstan and several European countries, including the United Kingdom, which has rapidly expanded its seasonal recruitment of agricultural workers from Central Asia (Maslanov & Tarasova, 2023; UK Home Office & Department for Environment, Food & Rural Affairs [DEFRA], 2025); the specific mechanisms behind this shift are examined in the results below. At the same time, remittance flows to the wider Europe and Central Asia region fell by about 10 per cent to some USD 71 billion in 2023,

a decline driven by reduced transfers from Russia and exacerbated by a rouble depreciation of about 39 per cent against the US dollar (World Bank & KNOMAD, 2024).

These external shocks interact with deep-seated structural features. The region is marked by pronounced socio-economic contrasts: Kazakhstan combines a larger economy, steadier growth and comparative labor-market stability, which increasingly turn it into a magnet for workers from Kyrgyzstan, Uzbekistan and Tajikistan, whereas the southern states face labor-surplus conditions and high dependence on external earnings (Kadyrbek & Koblandin, 2025). Persistently high informal employment across the region limits access to social protection and complicates the integration of migrants into formal labor markets (Zakhvatov, 2025), a pattern quantified in the results below. Demographic asymmetry compounds these pressures: Uzbekistan and Tajikistan have young, fast-growing populations entering the labor market, while receiving countries face ageing and sectoral labor shortages (Institute of Oriental Studies, Russian Academy of Sciences, 2025).

The institutional context adds a further layer. Kazakhstan and Kyrgyzstan are members of the Eurasian Economic Union, which grants their citizens broad access to one another's labor markets and to that of Russia, whereas Tajikistan and Uzbekistan remain outside the union and rely on national permit regimes and bilateral agreements. This asymmetry in membership partly explains the different exposure of the four states to the post-2022 shock and the different speed of their reorientation. Because labor migration is so tightly woven into household incomes, public finances and demographic balance, changes in its direction are not merely a matter of external mobility but a question of national economic security, which is why the reconfiguration under way carries implications well beyond the migrants themselves and reaches into the developmental prospects of the region as a whole.

Against this background, the article is organized around one central question: how is the traditional, Russia-centred labor-migration model of Central Asia being reconfigured under conditions of geopolitical transformation, and what economic, demographic and governance implications does this reconfiguration carry for the states of the region? This question is addressed through three sub-questions: (i) which factors are driving the diversification of migration destinations away from a single dominant corridor; (ii) how do the four principal sending

states – Kazakhstan, Kyrgyzstan, Tajikistan and Uzbekistan – differ in their exposure and response; and (iii) what policy and governance adaptations would strengthen the resilience of the regional migration system.

The closest recent regional literature approaches this picture from separate angles: Kadyrbek and Koblandin (2025) examine the geopolitical redistribution of flows, Kurovsky, Mishin and Yarmosh (2025) trace the labor-market and remittance linkage with Russia, and Maslanov and Tarasova (2023) follow the emergence of European destinations. Each of these studies develops one strand in depth, yet none connects it to the others within a single comparative frame, and this is the gap the present study addresses in three ways. The most direct contribution is analytical: the study brings together this fragmented, rapidly growing literature with the latest institutional statistics into a single frame that separates the region's established corridor to Russia from its emerging directions, namely Kazakhstan, the European Union and the United Kingdom, and Türkiye, the Gulf and the Republic of Korea. Building on that frame, it then compares the four main sending states systematically, and the comparison shows that a common shock produces divergent trajectories depending on remittance dependence, demographic pressure and policy capacity, a step that is largely absent from single-country or single-theme treatments in the existing literature. Finally, through an explicitly labelled qualitative scenario extending to 2030, the study sets out a diversification-and-protection agenda that ties destination diversification, reduced dependence on any single market, formalization of employment and the protection of migrants' rights to the long-term resilience of the regional economy.

The remainder of the article proceeds as follows. Section 2 reviews the recent literature thematically and situates it within established migration theory, identifying the research gap. Section 3 sets out the materials and methods and their limitations. Section 4 presents the results, including a comparative destination matrix and a qualitative scenario to 2030. Section 5 discusses the shift toward a multipolar migration system, the remittance paradox, informality and demographic asymmetry, and the resulting policy implications. Section 6 concludes.

Literature review

Research on labor migration in Central Asia has expanded rapidly since 2022, reflecting the scale of the changes under way. The literature spans the

transformation of the geopolitical environment and the role of Russia as the traditional centre of attraction, the emergence of new destinations, and the structural characteristics of the region's labor markets. This section organizes these contributions thematically and connects them to established migration theory, which helps interpret the region-specific evidence rather than treating it in isolation.

The regional evidence can be read through the lens of long-standing migration theory. Classical accounts explain movement through wage differentials, employment opportunities and the structural demand of receiving economies for labor, and emphasize that migration systems, once established through networks and shared institutions, tend to persist and reproduce themselves (Massey et al., 1993). This helps explain why the Russia-centred corridor, built on a shared language, visa-free access and dense diaspora networks, proved so durable. Yet the migration–development literature cautions that the developmental outcomes of migration are contingent on structural conditions in origin countries rather than automatic, so that remittances and return can either support or undermine long-term development depending on how they are governed (de Haas, 2010). These two insights – the inertia of established systems and the conditionality of their effects – frame the analysis that follows.

A central strand of recent work examines how the Russian–Ukrainian conflict has reshaped migration routes. Kadyrbek and Koblandin (2025) attribute the redistribution of flows since 2022 to sanctions pressure, rouble depreciation and the tightening of Russian migration policy, a reading echoed in institutional forecasting: the International Centre for Migration Policy Development (2025) projects that migration dynamics in Eastern Europe and Central Asia will remain highly volatile in the coming years, shaped by the trajectory of the conflict and by the state of relations between Russia and the West. The literature thus converges on the view that the region has entered a period of heightened volatility in which state migration strategies are becoming increasingly diversified.

Within this reconfiguration, attention has concentrated specifically on the rising role of Kazakhstan. Kadyrbek and Koblandin (2025) attribute its growing attractiveness to steady economic performance, relative labor-market stability and a comparatively predictable regulatory environment, which together draw migrants from Kyrgyzstan, Uzbekistan and Tajikistan into construction, industry and services. Despite the structural difficulties examined

below, the literature converges on the assessment that Kazakhstan is consolidating as the principal regional hub of labor migration in the region.

Remittances occupy a prominent place in the literature as a principal source of external income for Tajikistan and Kyrgyzstan. Maslanov and Tarasova (2023) emphasize that a decline in transfers from Russia significantly affects household welfare and social stability across the region, while Kurovsky, Mishin and Yarmosh (2025) show that remittances exert a direct influence on macroeconomic indicators, so that downturns in the Russian economy translate quickly into fiscal and social stress in the sending states. The literature identifies a paradox that the results below examine in quantitative terms: migration remains a vital mechanism for households, yet dependence on migrant income heightens the macroeconomic vulnerability of sending states to external shocks.

This vulnerability is compounded by the structure of employment itself: informality is a recurring theme in the literature, with reported rates that remain high across the region despite low registered unemployment (Zakhvatov, 2025). The literature stresses that a large informal sector reduces the effectiveness of employment policy, obstructs the provision of social guarantees, creates conditions for the exploitation of migrants by employers and limits access to formal recruitment channels; Kadyrbek and Koblandin (2025) add that high informality undermines the stability of labor markets and constrains the legal regulation of flows, compounded further by the reluctance of many migrants to enter formal recruitment programmes given their complexity, bureaucratic burden and information gaps. Remittance dependence and informal employment are thus two closely linked dimensions of the same structural vulnerability running through the sending states of the region, quantified below.

Demographic research underscores that Uzbekistan and Tajikistan remain the most dynamic states by the number of new labor-market entrants, generating a sustained outward migration pressure, while receiving countries – Russia, Kazakhstan and the European states – confront ageing and shortages in agriculture, construction, services and utilities (Institute of Oriental Studies, Russian Academy of Sciences, 2025). A distinct literature documents the rising European direction. Maslanov and Tarasova (2023) note that, after Brexit, the United Kingdom became one of the first European countries to attract seasonal workers from Central Asia through a six-month scheme, and that demand for such workers

grew as Russian and Belarusian nationals were excluded from a number of programmes. Government data confirm the scale of the shift: by 2024 nationals of Kazakhstan, Kyrgyzstan, Tajikistan and Uzbekistan accounted for about 78 per cent of Seasonal Worker visa holders (UK Home Office & DEFRA, 2025). Alongside this, recruitment-fee abuse and fraud have emerged as significant risks for prospective workers (Migration Policy Centre, 2026).

Work on policy stresses that the states of the region are at an early stage of reformulating their migration governance, and that reform must address the diversification of destinations, reduced dependence on the Russian market, the protection of migrants' rights and the upgrading of workforce skills (Kurovsky et al., 2025). International organizations recommend deeper cooperation with European states, the development of bilateral employment programmes and the strengthening of domestic labor-market infrastructure (International Centre for Migration Policy Development, 2025). Two recent contributions sharpen the picture from angles that the present study does not itself pursue. Eraliev and Urinboyev (2024), through an ethnography of Uzbek migrant workers in Russia and their families at home, show how the region's grand geopolitical narratives are negotiated at the everyday, micro level of migrant life – a level largely absent from the macro-institutional evidence assembled here. Benedetti et al. (2025) document a parallel, still-emerging diversification from below: interviews with Central Asian truck drivers show how individual workers weigh Russian and European destinations against one another, reinforcing the destination shift traced at the aggregate level in this article. What remains underdeveloped, and what the present article addresses, is an integrated, comparative treatment that connects geopolitical reconfiguration, remittance dependence, informality, demography and new destinations across the main sending states within a single macro-level frame, and that translates the resulting picture into a forward-looking policy agenda.

Materials and methods

The methodological basis of the study combines qualitative and, where reliable data permit, descriptive quantitative approaches, in order to provide a comprehensive analysis of labor migration in Central Asia. This choice reflects the multilayered nature of migration, which encompasses political, economic, demographic and institutional dimensions. The study applies comparative analysis, content

analysis and a descriptive review of secondary statistics; it does not generate new statistical estimates but synthesizes existing evidence.

The study is designed as descriptive and analytical, aimed at identifying the key trends and factors shaping labor migration over the period from January 2022 to mid-2026, the interval bounded by the onset of the Russian–Ukrainian conflict and the preparation of this article. This design makes it possible to compare the dynamics of migration flows before and after decisive geopolitical events – in particular the Russian–Ukrainian conflict, the tightening of sanctions and changes in the legislation of countries involved in migration exchange (Kadyrbek & Koblandin, 2025; International Centre for Migration Policy Development, 2025). A comparative approach allows the migration processes of Kazakhstan, Kyrgyzstan, Tajikistan and Uzbekistan to be set against one another and against their interaction with the principal external centres of attraction – Russia, the European Union and the United Kingdom, and Türkiye, the Gulf and the Republic of Korea (Maslanov & Tarasova, 2023).

Sources were identified through a structured search in the database Scopus, Google Scholar and CyberLeninka, as well as through direct searches in official repositories of the World Bank, the International Organization for Migration, The UK Government and the International Centre for Migration Policy Development, using combinations of the keywords “labour migration”, “Central Asia”, “remittances”, “informal employment” and the names of four sending states in both English and Russian, and was supplemented by tracking citation from the most relevant initial results; the search was conducted from March to August 2026 and was limited to material published from 2022 onwards, with earlier theoretical work included only there, where they were fundamental to migration theory. The analysis is based on three categories of material. The first is a peer-reviewed and scientific literature, including regional analytical work on the transformation of migration processes and their impact on the labor market (Kadyrbek and Coblandin, 2025; Kurovsky et al., 2025; Maslanov and Tarasova, 2023; Eraliev and Urinboyev, 2024; Benedetti et al., 2025). The second is institutional statistics and reports from international bodies, including data on remittances and regional migration from the World Bank, the International Organization for Migration, Seasonal statistics of the United Kingdom Government. Labour statistics and projections of the International Centre for Migration Policy Development (Bossavi

et al., 2024; World Bank and KNOMAD, 2024; IOM, 2024; Migration Data Portal, 2024; UK Home Office and DEFRA, 2025; International Centre for Migration Policy Development, 2025).

The third is expert and analytical commentary used to interpret trends, including material presented at an international conference of the Institute of Oriental Studies of the Russian Academy of Sciences (2025) and analysis of informal employment and diversification (Zakhvatov, 2025; Carnegie Endowment for International Peace, 2024). Sources were selected on the basis of direct thematic relevance to labor migration in Central Asia and its post-2022 transformation; peer-reviewed academic articles and primary institutional statistical publications were prioritized as the evidentiary core, while media and expert-commentary material was used only in a supporting role, to corroborate or contextualize findings already documented in the academic and institutional literature, and not as a stand-alone source of quantitative claims. In total, the study draws on the eighteen sources listed in the References section, spanning foundational migration theory together with the regional literature and statistics published predominantly between 2022 and 2026.

Content analysis is used to systematize the material and to identify recurring themes across scholarly, policy and institutional sources – among them the declining role of Russia, the rising attractiveness of Kazakhstan, the development of European seasonal-employment schemes and the impact of sanctions on migration routes. Comparative analysis is used to bring out differences among the states of the region in informal employment, economic resilience, exposure to external markets and migration policy. The descriptive review of secondary statistics compares the timing of changes in migration and remittance flows with economic and geopolitical events, in order to establish plausible associations rather than causal estimates. The three methods are triangulated so that macro-level figures reported by international organizations can be read against the interpretations found in the scholarly and expert literature.

Several limitations qualify the findings. The analysis focuses on four of the five Central Asian states – Kazakhstan, Kyrgyzstan, Tajikistan and Uzbekistan – and does not include Turkmenistan; comparable, internationally published statistics on Turkmenistan's labor migration are not available, since the country does not release migration and labor-market data through the World Bank, IOM or ILO statistical systems in a form consistent with

its neighbours, and this closed reporting regime made a comparable inclusion impossible within the scope of this study. Beyond this, regional statistics for the four included states are also uneven, and in many Central Asian states informal employment and irregular migration are imperfectly recorded, so figures should be read as indicative (Zakhvatov, 2025). The geopolitical situation is highly volatile, and migration dynamics can shift rapidly, which limits the precision of any projection (International Centre for Migration Policy Development, 2025). Data on European employment programmes remain fragmentary despite the documented growth of interest (Maslanov & Tarasova, 2023). The scenario presented in the results is therefore an explicitly qualitative one and should not be read as a statistical forecast. Ethically, the study relies exclusively on publicly available published data that contain no personal information, and all sources are appropriately cited.

Results and discussion

The analysis identifies a set of interconnected trends that define the current and prospective configuration of labor migration in Central Asia. Migration in the region is increasingly shaped by the interaction of geopolitical factors, structural imbalances in labor markets, demographic change and evolving state strategies for managing mobility. The results are organized around the reconfiguration of routes, the position of the main states, the economic and demographic dimensions, and a forward-looking scenario.

The first result is confirmation of a durable shift of migration flows away from the traditional Russian direction toward alternative centres of attraction. From 2022 onward, sanctions pressure, currency instability, a tightening migration regime and a contraction of formal employment made the Russian labor market less predictable, leading to a gradual but steady erosion of Russia's share of the region's flows (Kadyrbek & Koblandin, 2025). The picture is nonetheless nuanced rather than a collapse. Russia remains the single largest destination, and in the short run some flows proved resilient; sanctions-era demand, driven partly by Russia's own acute labor shortages, kept numbers high in 2022–2023 before anti-migrant measures intensified after the March 2024 attack on the Crocus City Hall concert venue in Moscow, which was followed by stricter rules and enforcement (Kadyrbek & Koblandin, 2025; Kurovsky et al., 2025). The net effect is a relative

decline in Russia's dominance rather than its disappearance.

The available figures caution against overstating the speed of the shift. Official statistics still record on the order of four million citizens of the Central Asian states residing in Russia, and for the most dependent origin countries the short-term adjustment has been uneven (Kurovsky et al., 2025). Tajikistan is illustrative: even as the wider regional decline set in, Tajik remittances rose by about 27 per cent in 2024 to some USD 5.8 billion, reflecting both rouble movements and the resilience of demand in sectors that continue to rely on migrant labor (World Bank & KNOMAD, 2024). At the same time, several sources report a contraction in migrant numbers in Russia during 2024 and a tightening of the legal environment, with successive legislative measures raising the standard for legal status and expediting removals (Kadyrbek & Koblandin, 2025). The result is a paradox on the receiving side: Russia continues to face acute labor shortages while simultaneously restricting the foreign workers who could fill them, which increases uncertainty and accelerates the search for alternatives among Central Asian workers (Kurovsky et al., 2025).

Simultaneously, the weight of Kazakhstan, the European Union and the United Kingdom has grown, reflecting the expansion of seasonal programmes, rising demand for low- and medium-skilled labor, and comparatively greater legal protection for workers.

A second result is the consolidation of Kazakhstan as the leading centre of attraction within the region. Economic stability, comparatively higher wages and growing domestic demand for labor make the country a preferred destination for migrants from Kyrgyzstan, Uzbekistan and Tajikistan, and it hosts by far the largest migrant stock in the region, on the order of several million (Kadyrbek & Koblandin, 2025; IOM, 2024). Kazakhstan also displays a more flexible approach to regulation than Russia, offering simpler regimes of employment and integration, reinforced for citizens of Eurasian Economic Union member states by free movement of labor. As a result, intra-regional migration is intensifying and Kazakhstan is increasingly becoming a structural element in the distribution of the region's labor resources, even as informal employment above 30 per cent continues to limit protection (Zakhvatov, 2025). Kazakhstan is thus becoming not only a centre of attraction but also a stabilizing, buffer element in the regional labor space: it absorbs significant in-

flows from neighbouring states while also serving as a space in which workers gain experience before moving onward. If this tendency consolidates, Kazakhstan may come to occupy a role analogous to that of the Central European states within the wider European migration system, mediating flows between labor-surplus and labor-scarce zones.

A third result is the steady growth of migration toward European countries, above all the United Kingdom, and this growth is unlikely to be a transient effect of the geopolitical crisis. After Brexit and the exclusion of Russian and Belarusian nationals from a number of labor programmes, the United Kingdom widened access for Central Asian citizens, and the Seasonal Worker route – introduced in 2019, capped, and extended for a further five years – became a significant channel, principally for agricultural work (Maslanov & Tarasova, 2023; UK Home Office & DEFRA, 2025). European Union states, especially in the east, likewise show rising demand for Central Asian labor, driven by a long-term demographic challenge of ageing populations and shortages of low-skilled and seasonal workers that is unlikely to reverse. This growth is not without cost: the popularity of the schemes has been accompanied by recruitment-fee abuse and fraudulent intermediaries, which expose prospective workers to debt and exploitation, showing that opening legal channels does not by itself guarantee protection without effective oversight of intermediaries (Migration Policy Centre, 2026). Europe is therefore becoming a durable, but not unproblematic, component of the region's migration future, intensifying competition among sending states for access to legal channels.

The scale of the British channel, though modest in absolute terms, is telling. In 2023 the route granted several thousand visas to each of the main Central Asian nationalities – on the order of 7,900 to Kyrgyzstan, 5,700 to Tajikistan, 5,000 to Kazakhstan and 4,100 to Uzbekistan – and by 2024 Central Asian workers accounted for about 78 per cent of all Seasonal Worker visa holders, some 27,759 individuals and a rise of roughly 22 per cent on the previous year, with Kyrgyzstan the single most represented nationality and the overall allocation for the following season set at roughly 43,000 places (UK Home Office & DEFRA, 2025). Beyond Europe, diversification extends to Asia and the Middle East: the Republic of Korea has expanded employment quotas for Uzbek and Kyrgyz workers, Türkiye and the Gulf states absorb hundreds of thousands of Central Asian labor migrants, and Uz-

Uzbekistan has concluded bilateral labor arrangements with partners including Germany, thereby spreading its exposure across several markets rather than a single one (Carnegie Endowment for International Peace, 2024; Maslanov & Tarasova, 2023). Taken together, these developments confirm that the diversification of destinations is broad-based rather than confined to a single alternative to Russia, and that the region has entered a phase of multipolarity in which the orientation toward Russia that dominated for three decades is no longer the sole determinant of its migration architecture. In place of a linear “Central Asia – Russia” model, a network of multidirectional flows is forming, in which Kazakhstan acts as a new regional centre, European Union states absorb seasonal and low-skilled labor, the United Kingdom sustains a structured recruitment channel after Brexit, and destinations such as Türkiye, the Republic of Korea and the Gulf states expand. Interpreted through migration-systems theory, this is the partial reconfiguration of a durable system under an exogenous shock: established networks slow the change, but they do not prevent the emergence of new corridors once relative incentives shift decisively (Massey et al., 1993).

The economic analysis shows that remittances continue to play a decisive role in the financial stability of Tajikistan, Kyrgyzstan and, to a lesser degree, Uzbekistan, but that dependence on transfers from a single market has become a source of risk – a paradox in which migration relieves social pressure and sustains household incomes even as it exposes sending economies to shocks beyond their control. Following the rouble’s depreciation, remittances to the wider region fell in 2023, with country declines of about 42 per cent for Uzbekistan, 12 per cent for Kyrgyzstan and 8 per cent for Tajikistan (World Bank & KNOMAD, 2024; Carnegie Endowment for International Peace, 2024). Inflows from European destinations are rising, which gradually reduces reliance on the Russian direction, but they do not yet compensate for its structural weight in the most vulnerable economies, where remittances still amount to a very large share of gross domestic product (World Bank & KNOMAD, 2024; Migration Data Portal, 2024). Set against the migration-development literature, this pattern confirms that the developmental value of remittances is conditional: without domestic investment, diversification of income sources and productive use of transfers, high remittance ratios translate into fragility rather than resilience (de Haas, 2010). The economic model

built on external labor income thus remains exposed to shocks originating outside the region, and the states of the region face the task of building their own mechanisms of resilience to reduce this exposure.

The demographic analysis reveals a pronounced imbalance. Uzbekistan and Tajikistan face a continuous increase in the young working-age population, which places sustained pressure on domestic labor markets, while Kazakhstan, Russia and the European states experience ageing and shortages in specific sectors (Institute of Oriental Studies, Russian Academy of Sciences, 2025). This asymmetry sustains a durable migration cycle: sending states relieve pressure on domestic employment, and receiving states cover shortages in agriculture, construction, services and utilities. Because the asymmetry is structural rather than cyclical, it is likely to persist and to sustain migration intensity for decades: migration functions not only as an economic necessity but also as a mechanism of demographic adjustment at the level of the wider macro-region, redistributing labor from surplus to deficit zones.

The analysis of employment structure confirms that the labor markets of the region remain exposed to imbalances associated with informality: informal employment is reported to exceed 60 per cent in Kyrgyzstan, to stand at around 50 per cent in Uzbekistan and to exceed 30 per cent in Kazakhstan (Zakhvatov, 2025). High informality makes migrants more vulnerable to exploitation, reduces their access to social guarantees, limits their capacity to participate in formal employment programmes in receiving countries and impedes the accumulation of human capital; it also weakens the effectiveness of national employment policy and complicates the legal regulation of flows, reinforcing the barriers identified in the literature (Kadyrbek & Koblandin, 2025). Addressing informality as a barrier to integration requires an integrated policy response – the reform of labor legislation, greater transparency in labor markets, the development of social-protection institutions and better information for migrants about legal employment – without which the gains from destination diversification and regulated recruitment will be only partially realized.

A qualitative scenario to 2030

On the basis of the trends documented for 2022–2025, the study sets out an explicitly qualitative scenario to 2030, organized around three blocks –

geopolitical factors, economic and labor-market conditions, and the migration policies of receiving countries. The scenario is directional and illustrative; it is grounded in the reviewed evidence but is not a statistical forecast, and the descriptions below should be read as the authors' assessment of likely direction and relative magnitude rather than as precise predictions.

Scenario A (baseline: maintaining current trends). Conditions: This benchmark extrapolates documented trends for 2022-2025 without assuming further major shocks or policy changes; a return to Russian dominance is considered unlikely. Key factors: the continued pressure of sanctions, currency instability, tightening migration regime and reduction of formal employment in Russia (Kadyrbek & Koblandin, 2025); sustainable demand linked to population aging; and structural deficits in the UK and the European Union. (UK Home Office and DEFRA, 2025; International Centre for Migration Policy Development, 2025) ; ongoing active bilateral negotiations between Uzbekistan and Turkey, the Gulf countries and the Republic of Korea (Carnegie Endowment for International Peace, 2024). Expected output: Russia's share of regional flows continues to decline in relative terms, although it remains important for low-skilled workers and construction; Kazakhstan continues to strengthen its position as the main regional destination by leveraging demand in construction. Industry, services and agriculture (Kadyrbek & Koblandin, 2025; IOM, 2024); seasonal and low-skill demand in the United Kingdom and the European Union persists or is increasing along regulated and restricted routes; diversification towards Turkey, The Gulf countries and the Republic of Korea continue, especially for Uzbekistan; informal employment has declined only slightly, sources of remittances are being diversified away from Russia, and demographic pressures in the south continue to encourage emigration (Hippyov, 2025; Institute of Oriental Studies, Russian Academy of Sciences, 2025). This scenario corresponds to the trajectories shown in table 2.

Scenario B (accelerated divergence from Russia). Conditions: conditions that already discourage flows from Russia are becoming even more severe. Key factors: renewed pressure from sanctions; tightening migration and residency regimes in line with the principles adopted after the 2024 attack on Cro-

cus City Hall; ongoing rouble instability. Expected results: Russia's share of regional flows is falling faster than at the baseline, and returnees are rising; Kazakhstan, the European Union, and the United Kingdom are absorbing a larger share of displaced demand, respectively; which requires expanding quotas for seasonal workers and the Kazakh labor force. Market absorption capacity is higher than currently expected; diversification to Turkey, the Persian Gulf, and the Republic of Korea is accelerating, as sending countries negotiate additional bilateral channels to compensate for the loss of the Russian market more quickly; adjustment costs fall unevenly – for Tajikistan and Kyrgyzstan, where dependence on Russia is highest, This scenario implies the highest short-term costs, as alternative routes absorb only part of the lost revenues, while for Kazakhstan this means faster consolidation as the main center of the region and correspondingly greater urgency in solving the problem of informal employment and integration opportunities.

Scenario C (partial restoration of the Russian direction). Conditions: The geopolitical and economic environment surrounding Russia is stabilizing – for example, with sanctions easing, the ruble strengthening, or renewed labor shortages – prompting Russian authorities to ease migration restrictions. Key factors: the institutional inertia of seasonal arrangements and bilateral agreements built with Europe and Asia in 2022-2025 that are unlikely to be abandoned, even though the Russian corridor has been partially restored; established networks and language skills, which reduces the cost of returning to Russia for construction and low-skilled work. Expected results: part of the flow diverted to Kazakhstan, the European Union and the United Kingdom during 2022-2025 is returning to the traditional Russian corridor; the diversification already started does not completely change, but growth in new directions slows down, Easing of short-term pressure in the form of cash transfers to Tajikistan and Kyrgyzstan; for Kazakhstan, the pace of consolidation as a hub has slowed somewhat, although its role as an intra-regional destination remains resilient given the relatively predictable regulatory environment. None of the three scenarios points to a return to a fully monopolar, Russia-oriented model for the four sending states; what differs between them is the pace and degree of diversification, not its main direction.

Table 1*Comparative matrix of labor-migration destinations for Central Asia*

Destination	Main demand drivers and sectors	Legal channels and protection	Trajectory (authors' assessment)
Russian Federation	Long-standing shortages in construction, utilities and services; shared language and diaspora networks	Visa-free access for most; large informal segment; tightening quotas and enforcement since 2024	Still dominant but contracting share; rising uncertainty
Kazakhstan	Growth in construction, industry, services and agriculture; ageing in selected sectors	EAEU free movement for members; comparatively predictable regime; partial informality	Rising; emerging regional hub
European Union and the United Kingdom	Structural shortages in seasonal agriculture and low-skilled services; ageing populations	Regulated seasonal schemes (e.g. UK Seasonal Worker visa); no settlement; recruitment-fee risks	Rising from a low base; structural demand
Türkiye, the Gulf and the Republic of Korea	Construction, services and manufacturing; targeted bilateral labor agreements	Bilateral and quota-based schemes; variable protection	Gradually expanding diversification channel

Note. Authors' synthesis, row by row, based on Kadyrbek and Koblandin (2025) and Kurovsky et al. (2025) for the Russian Federation; Kadyrbek and Koblandin (2025), IOM (2024) and Zakhvatov (2025) for Kazakhstan; Maslanov and Tarasova (2023), UK Home Office and DEFRA (2025) and Migration Policy Centre (2026) for the European Union and the United Kingdom; and Carnegie Endowment for International Peace (2024) and Maslanov and Tarasova (2023) for Türkiye, the Gulf and the Republic of Korea. The trajectory column is the authors' qualitative assessment, derived from the direction and consistency of the evidence reported in these sources rather than from a separate quantitative index.

Table 2*Indicative qualitative scenario of Central Asian labor migration to 2030 (Scenario A: baseline)*

Destination	Observed trend, 2022–2025	Indicative direction to 2030 (authors' qualitative scenario)
Russian Federation	Falling remittances and share of flows; tighter rules after 2024; still the single largest destination	Continued relative decline; remains significant for low-skilled and construction work
Kazakhstan	Consolidating as the main regional destination; growing intra-regional inflows	Further growth as a regional hub across construction, industry, services and agriculture
United Kingdom	Central Asians rose to about 78% of Seasonal Worker visas by 2024; scheme extended	Sustained or higher seasonal demand within a capped, regulated route
European Union (excl. UK)	Ageing-driven demand; bilateral agreements (e.g. Germany, Poland)	Gradual expansion of seasonal and low-skilled channels
Türkiye, Gulf, Republic of Korea	Expanding bilateral schemes; hundreds of thousands already involved	Steady diversification, especially for Uzbekistan

Note. The table sets out Scenario A (baseline continuation of current trends), the authors' qualitative assessment of likely direction; it is not a statistical forecast. Row-level evidence: Kadyrbek and Koblandin (2025) and Kurovsky et al. (2025) for the Russian Federation; Kadyrbek and Koblandin (2025) and IOM (2024) for Kazakhstan; UK Home Office and DEFRA (2025) for the United Kingdom; Maslanov and Tarasova (2023) and International Centre for Migration Policy Development (2025) for the European Union excluding the United Kingdom; and Carnegie Endowment for International Peace (2024) for Türkiye, the Gulf and the Republic of Korea. The "indicative direction" column reflects the authors' qualitative extrapolation of these observed trends rather than a statistical projection. Scenarios B (accelerated divergence from Russia) and C (partial recovery of the Russian direction), together with their implications for each sending state, are discussed in the text.

Table 3*Indicative qualitative scenario of Central Asian labor migration to 2030 (Scenario B: accelerated divergence from Russia)*

Destination	Trigger condition relative to the baseline	Indicative direction to 2030 (Scenario B)
Russian Federation	Renewed sanctions pressure; a tighter migration and residency regime along the lines adopted after 2024; continued rouble instability	Faster relative decline in share of flows than in the baseline; rising return migration
Kazakhstan	Absorbs a larger share of demand displaced from Russia	Faster consolidation as regional hub, but with correspondingly greater urgency in addressing informal employment and integration capacity
United Kingdom	Displaced demand from Russia adds pressure on the capped seasonal route	Expanded seasonal-worker quotas required to absorb higher demand
European Union (excl. UK)	Displaced demand from Russia adds to existing ageing-driven demand	Faster expansion of seasonal and low-skilled channels than in the baseline
Türkiye, Gulf, Republic of Korea	Sending states negotiate additional bilateral channels to offset the loss of the Russian market more quickly	Accelerated diversification; adjustment costs fall unevenly, with the sharpest short-term costs for Tajikistan and Kyrgyzstan

Note. The table sets out Scenario B (accelerated divergence from Russia), the authors' qualitative assessment of likely direction relative to the baseline in Table-2; it is not a statistical forecast. The scenario assumes that the conditions already pushing flows away from Russia intensify further. Adjustment costs are assumed to fall unevenly across sending states, with Tajikistan and Kyrgyzstan – whose remittance dependence on Russia is highest – facing the sharpest short-term costs, since alternative destinations would absorb only part of the lost income.

Table 4*Indicative qualitative scenario of Central Asian labor migration to 2030 (Scenario C: partial recovery of the Russian direction)*

Destination	Trigger condition relative to the baseline	Indicative direction to 2030 (Scenario C)
Russian Federation	Eased sanctions pressure, a strengthening rouble, or renewed Russian labor shortages that lead authorities to relax migration restrictions	Partial recovery of flows previously diverted elsewhere, particularly for construction and low-skilled work
Kazakhstan	Some previously diverted flows return to the Russian corridor	Pace of consolidation as hub somewhat reduced, though its role as an intra-regional destination remains durable
United Kingdom	Institutional inertia of the seasonal scheme limits reversal	Growth in seasonal demand slows but does not reverse
European Union (excl. UK)	Institutional inertia of bilateral agreements limits reversal	Growth in seasonal and low-skilled channels slows but does not reverse
Türkiye, Gulf, Republic of Korea	Established networks and language familiarity lower the cost of returning to Russia	Diversification continues but at a reduced pace

Note. The table sets out Scenario C (partial recovery of the Russian direction), the authors' qualitative assessment of likely direction relative to the baseline in Table-2; it is not a statistical forecast. The scenario rests on the premise that the geopolitical and economic environment surrounding Russia stabilizes. The diversification achieved under 2022-2025 does not fully reverse, because the seasonal schemes and bilateral agreements built with Europe and Asia over this period carry their own institutional inertia.

Reading the results country by country shows that a common external shock is producing four distinct trajectories. Kazakhstan occupies a dual position: it is both a sending country and, as noted above, the region's principal receiver, drawing intra-regional labor into construction, industry, services and agriculture; its Eurasian Economic Union

membership and comparatively predictable regime reinforce this role (Kadyrbek & Koblandin, 2025; IOM, 2024). Uzbekistan, the most populous state, has moved fastest to diversify: alongside its continued presence in Russia, it has actively negotiated bilateral channels with European and Asian partners and invested in pre-departure preparation, which

positions it to spread risk across multiple markets (Carnegie Endowment for International Peace, 2024; Maslanov & Tarasova, 2023).

Kyrgyzstan and Tajikistan, by contrast, remain the most exposed. Both are highly dependent on remittances – with ratios among the highest in the world – and both historically sent the overwhelming majority of their migrants to Russia, which leaves them most vulnerable to a contraction of that corridor (World Bank & KNOMAD, 2024). Kyrgyzstan benefits from Eurasian Economic Union membership, which eases access to the Russian and Kazakh markets, and it has become the single largest source of United Kingdom seasonal workers, yet its very high informal employment constrains the developmental value of migration (UK Home Office & DEFRA, 2025; Zakhvatov, 2025). Tajikistan, outside the union and with the highest remittance dependence, faces the sharpest adjustment risk and has the least developed diversification strategy, even as its remittance inflows proved resilient in the short term (World Bank & KNOMAD, 2024; Kadyrbek & Koblandin, 2025). This divergence underlines the central analytical point of the article: the regional shock is common, but its consequences are mediated by each state's institutional membership, demographic profile, remittance dependence and policy capacity.

The results confirm that the states of the region are engaged in a deep restructuring of migration policy. The reform agenda that follows from the analysis has several strands. Diversification of destinations and the negotiation of bilateral employment agreements reduce dependence on any single market and spread risk. Strengthening legal channels – transparent recruitment, regulated seasonal schemes and effective oversight of intermediaries – reduces informality and the scope for fraud. Portability of social rights and bilateral social-security coordination extend protection to migrants across borders. Investment in skills and pre-departure preparation raises the competitiveness of the region's workers and shifts flows toward higher-value employment. Reintegration support and the productive use of remittances convert return migration into a development resource. International cooperation, including with the European Union and international organizations, underpins these measures, as reflected in the establishment of migrant-resource and pre-departure facilities in the region (International Centre for Migration Policy Development, 2025; Kurovsky et al., 2025). Without such systemic reform, the region risks rising irregular migration, reduced competitiveness of its citizens abroad and deeper socioeconomic imbalances.

Two cross-cutting priorities deserve emphasis. The first is data: because informal and irregular flows are poorly measured, evidence-based policy requires investment in harmonized migration and remittance statistics, shared across the region and aligned with the definitions used by international organizations, so that the effects of diversification can be tracked rather than inferred. The second is the protection of workers within the very channels that are expanding fastest. The documented incidence of recruitment-fee abuse in seasonal schemes shows that opening legal routes is a necessary but not sufficient condition for decent work; bilateral agreements should therefore embed enforceable standards on recruitment costs, contract transparency and grievance mechanisms, coordinated between sending and receiving states (Migration Policy Centre, 2026; UK Home Office & DEFRA, 2025). Sequenced appropriately, these measures would allow the region to convert an externally driven reconfiguration into an opportunity to build a more resilient and rights-based migration system.

Conclusion

The study has assembled a comprehensive picture of the current state of labor migration in Central Asia and identified the trends likely to shape its dynamics in the coming years. In answer to the research question, the evidence shows that the traditional, Russia-centred model is being reconfigured into a more diversified, multipolar system driven by the interaction of geopolitical transformation, economic instability, demographic asymmetry and institutional reform, with Kazakhstan, the European Union and the United Kingdom emerging as the principal alternative destinations and Türkiye, the Gulf and the Republic of Korea providing additional channels.

Country-level comparison confirms that a common shock produces divergent trajectories, shaped chiefly by each state's remittance dependence and level of informal employment, the two variables that determine whether diversification strengthens resilience or merely reshuffles vulnerability.

The analysis contributes an integrated comparative frame, its application to the four principal sending states, and a qualitative scenario to 2030 that translates the evidence into a diversification-and-protection policy agenda. Its main limitations are reliance on secondary sources and uneven regional data, and the volatility of the geopolitical environment, which constrains projection. Future research should test the frame with primary evidence – em-

ployer and migrant surveys, administrative and remittance micro-data, and longitudinal tracking of returnees – and should examine in greater depth the governance of the new European and Asian channels and the measurement of informal and irregular flows. Under conditions of strategic manage-

ment, regional coordination and engagement with international partners, labor migration can become a factor of sustainable development, contributing to economic resilience, social welfare and regional integration rather than a source of recurrent vulnerability.

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