CHANGING BALKAN MIGRATION

TRENDS, DRIVERS AND PERSPECTIVES IN A TRANSFORMING REGION



Prof. Marin Drinov Publishing House
of Bulgarian Academy of Sciences

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Editor
Daniela Bobeva

Sofia • 2026

Prof. Marin Drinov Publishing House
of Bulgarian Academy of Sciences

To Jean-Pierre Garson, for his contribution and inspiration in migration research and policy.

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ISBN 978-619-245-673-3

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Daniela Bobeva

Foreword

Daniela Bobeva

The history of the Balkans has long been marked by significant interstate conflicts and socio-economic transformations, which have repeatedly triggered large-scale population movements. Since the late 1980s, the region has become one of the major sources of emigration flows to the European Union and beyond, driven by political instability, weak economies, and fragile labour markets. Despite the strong academic interest in Balkan migration at the end of the 20th century, recent research on the changing migration paths, drivers, and consequences has remained limited.

Over the past decade, however, the migration landscape has shifted. Outward migration has slowed, while Balkan countries face new challenges. Large refugee inflows transiting through or settling in the region changed the migration balance in several countries. The economies were hit by the revolving crisis, most severely by the global financial crises, COVID-19, and the war in Ukraine while labour shortages widened. At the same time, the growing regional economy has increased the demand for mobile labour and created new patterns of movement of goods, services, and people.

The aim of this book is to trace the evolution of migration processes in the Balkan countries over the past decade, outline emerging migration flows within and beyond the region, and analyse the long-term effects of decades of intensive emigration. The book highlights the key drivers of contemporary migration and explores future perspectives for the region.

The book consists of eight chapters, each presenting the current state and prospects of migration in eight countries and across the region. The concluding part of the book provides an analysis and synthesis of the major migration trends, with a particular focus on intra-regional migration and its socio-economic potential.

The country analyses capitalize on the significant improvements in the availability and quality of migration statistics, as well as on the opportunities they provide for cross-country comparisons. The book addresses a wide range of questions, including whether the region has already exhausted its potential as a source of emigration; whether there is evidence of "migration fatigue" in the Balkans; whether some Balkan countries have shifted from predominantly emigration to immigration patterns; what the consequences of large-scale emigration since the late 1980s have been for the region; whether remittances remain important for Balkan economies; how resilient the region is to external immigration shocks; and whether the region needs foreign labour to support economic growth. The book also provides well-documented evidence of the concerns surrounding the dramatic and alarming population decline in some of the smaller Balkan countries.

The book brings together scholars from across the region and thus demonstrates a strong academic partnership among local researchers from the countries that constitute the Balkans. It is particularly noteworthy that the volume includes contributions from five National Correspondents to the OECD Expert Group on Migration (SOPEMI). We are grateful to Jean-Christophe Dumont and the team of the OECD International Migration Division for their long-standing cooperation and support.

The Balkans, a Short History of Migration and Possible Future

Gudrun Biffl

Introduction

I would like to start with a map of the Balkans in 1992, at the end of the first of a series of wars in former Yugoslavia which lasted until 2001; Yugoslavia fell apart as a consequence, resulting in seven successor states. The map informs about the ethnic and religious diversity of the Balkan region, testimony of a history of wars, invasions and membership of at times long-lasting empires, all involving migrations, which convey a sense of identity to the rather fragmented populations of today, engendering an overlap of religions, languages, ethnic groups, and cultures. (Figure 1).

The word Balkan is Turkish and means "mountain," and the peninsula is certainly dominated by this landform. The diversity of ethnic groups derives in part from the compartmentalization brought about by the mountainous relief, partly by the occupation of empires, above all the Byzantine and Ottoman empire, partly also the Habsburg Empire. (King and Gëdeshi, 2023).

Migration – a Prominent Feature of Population Dynamics in the Balkans

Migrations have been a fundamental element in the history of the Balkans, resulting in a continuous and still ongoing transformation of the populations. (Sardon, 2001). From the period after World War II up to the fall of the Iron Curtain the region was characterized by at times substantial migratory flows, Yugoslavia being the sole region involving labor migration



Figure 1. The Balkan region and its political fragmentation in the context of the Yugoslav war (1992)

to Western Europe. It was the only country with a socialist regime to promote this type of emigration. In contrast, only ethnic minorities tended to leave for the West, e.g., German minorities from Romania to Germany, facilitated by a bilateral agreement (Fassmann and Münz, 1995; Kirişçi, 1995). But ethnic migration took also place between the Balkans and from the Balkans to Türkiye, the largest numbers being from Yugoslavia (largely Moslems from Bosnia, but also from Albania) and Bulgaria.

And then there was the Yugoslavian war which – between 1992 and 2002 – sent a wave of irregular migrants into the world, largely to Northern and Western Europe; alone from what is today the Federation of Serbia and Montenegro some 850,000 and from Bosnia-Herzegovina some 194,000. (UNHCR, 2003). But also the lure of the European Union (EU) brought citizens of Balkan countries to Western Europe – as soon as Slovenia became a member of the EU (2004), labor migration to

EU-Member States (EU-MS) set in, just as in the case of later enlargements of the EU by Bulgaria and Romania (2007) and eventually Croatia (2013), a consequence of free labor movement rights within the European Economic Area. (Biffl, 2024). Albania is a special case as the communist regime fell as late as the Berlin wall. Thereafter, emigration rose rapidly, though, in the main labor migration to Italy and Greece. (King 2003).

But things changed radically in 2015 and 2016. Then the Balkans changed from a region of emigration to immigration and transit migration, as almost two and a half million irregular migrants entered the European Union, largely involving the Balkans (Abikova and Piotrowicz, 2021; Khudoliy, 2022). The intensity and dynamics of refugee inflows into the Balkan region were determined by the economic and political situation in the major source countries of the day, in particular Afghanistan, Syria, Iraq, Pakistan, Bangladesh, and Iran. Many of the refugees used the so-called Western Balkans and Eastern Mediterranean Routes after passing through Türkiye, or via Lebanon to Greece, and some traveled via North African countries, mainly Egypt and Libya. The preference of the Balkans and Eastern Mediterranean Route relative to the North African and Western Mediterranean Route is a consequence of the high death toll of the latter. For an overview of the major migration routes into Europe see Figure 3. The largest numbers arrived in 2015; 85% of them entered Europe via the Balkans and the Eastern Mediterranean Route.

Since then, the inflows of irregular migrants have subsided significantly. In 2025, a total of 155,000 irregular migrants were registered by Frontex, one third of them entering Europe via the Balkans and the Eastern Mediterranean route. Figure 2 indicates that the number of irregular migrants declined on every route, particularly on the Eastern Routes (Tramountanis, 2023; Pries and Zülfikar Savci, 2023; IOM, 2025) However, the decline in registered numbers of irregular migrants should be taken with caution, as the inflows of migrants from the aforementioned source regions continued to rise in the major recipient countries of the EU, which should be taken as an indication for a large number of undetected migrants crossing the borders of Balkan countries and moving on (Manojlović, 2024)

Nonetheless, the decline in the number of registered irregular migrants between 2015 and 2025 is significant. This is seen as a consequence of the ‘closure’ of the Balkan route, on the one hand – in 2016, borders were closed by North Macedonia, Serbia, Croatia, Hungary and Slovenia – and an agreement between the EU and Türkiye, on the other. The EU-Türkiye agreement of 2016 was to reduce refugee inflows into Greece and to provide funding for the support of refugees remaining in Türkiye, above all Syrians. This agreement did not only help reduce the numbers

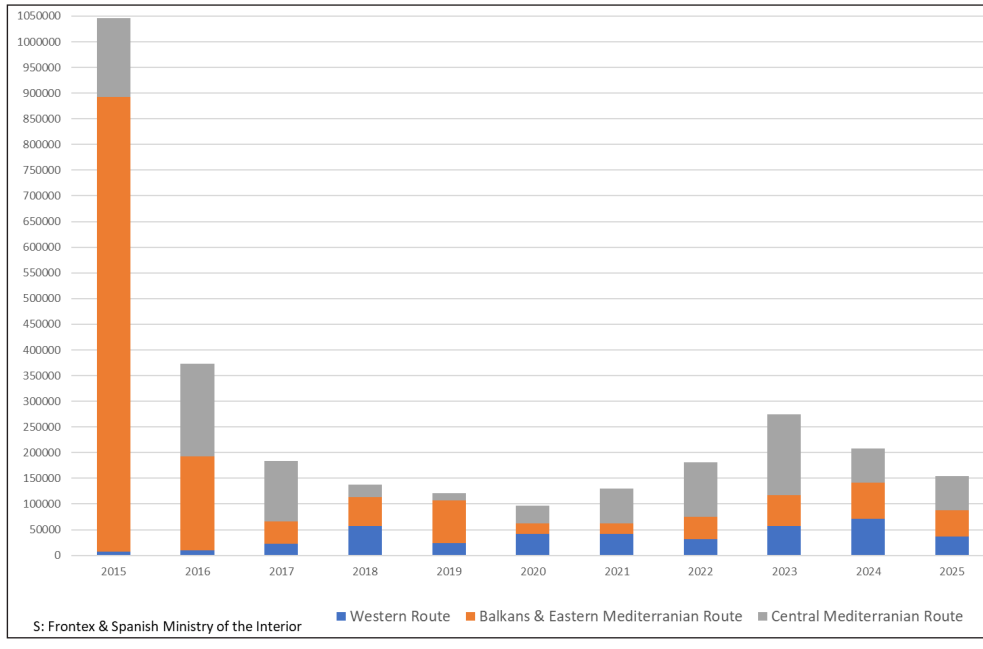


Figure 2. Irregular Migration: Entries per Year 2015 – 2025

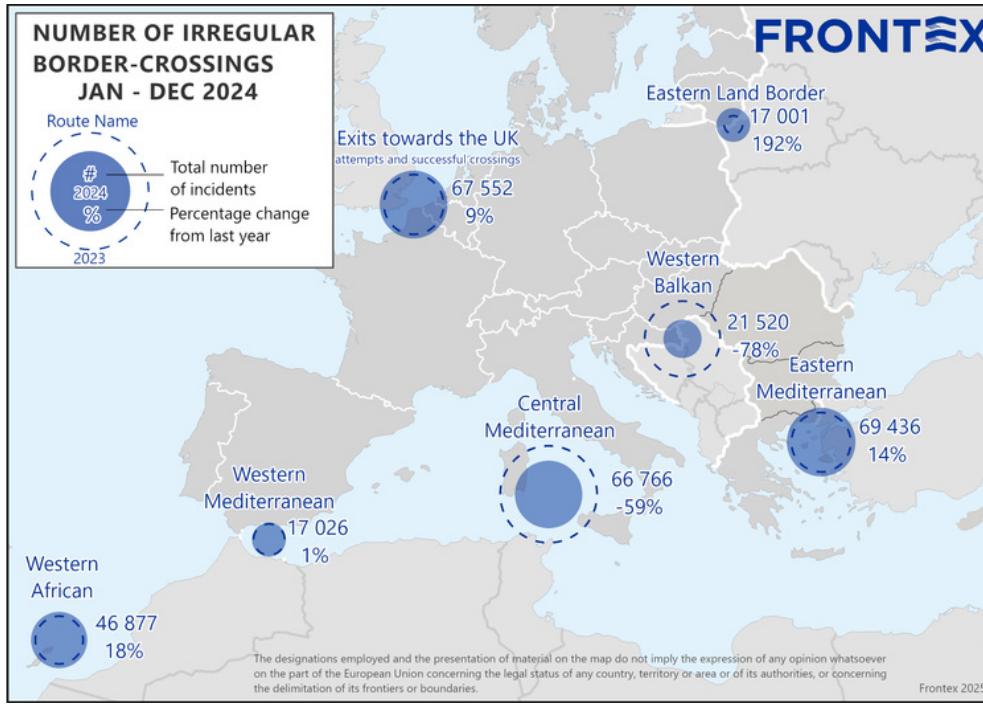


Figure 3. Major irregular migration routes into Europe (2024)

of irregular migrants entering Europe via Greece but contributed also to the decline of deaths in the Mediterranean Sea.

In 2020, the agreement was terminated, at least temporarily, by Erdogan, as a consequence of an escalation of violence in the Syrian Civil War. By then Türkiye had received some 3.6 million refugees from Syria. Therefore, Türkiye opened the borders to Bulgaria and Greece and invited the refugees to continue their flight to Europe. But Bulgaria and Greece reinforced their border controls, with the support of other EU-MS (Member States), which left thousands of refugees stranded in nowhereland (MMC, 2023). Only the defeat of Assad's regime in 2024 brought an end to emigration and a slow return of Syrian refugees to Syria. But still, substantial numbers of Syrians as well as Afghanis remain in the Balkans, either as asylum seekers (mostly in camps) or (rarely) as convention refugees.

In 2025, the Eastern Mediterranean route was relatively calm; the most frequently detected nationalities were Afghanis, but also Sudanese and Egyptians. However, pressure can shift quickly even when the broader regional picture points to a decrease, as the recent rapid rise of crossings from eastern Libya to the island of Crete has testified.

The Central Mediterranean route (from Algeria, Egypt, Libya, and Tunisia to Italy and Malta) was the most active migration route into the EU in 2025, as inflows from Libya remained the most important factor for the movements towards Italy. This route has long been the deadliest migration route in the world and continues to do so.

Outflows of Natives

While recent migration inflows into the Balkans were largely irregular and at times substantial, outflows were marked by political and institutional facilitators as well as barriers, depending on political affiliation. The Western Balkans were particularly affected by emigration: nearly 25% of its citizens live abroad (World Bank Group, 2026). But EU membership sent also large numbers of citizens from the Eastern Balkans to the West, many of them highly skilled. As a consequence, the region faces the multiple challenge of continued emigration, ageing of its populations and growing (skilled) labor shortages, a trend that requires coordinated national policies and enhanced regional collaboration.

Prospects for the Future?

As of today, the situation at the Balkan borders remains calm but uncertain. Migration pressure can arise quickly, shaped by conflict, social, political and economic instability. The Balkans themselves are a good example of migration as a tool to exit poverty or the political environment. The Western Balkan countries alone have a long history

of large-scale emigration, in the main to the OECD area, especially the European Economic Area (EEA) and Switzerland (OECD, 2022). The fall of the Iron Curtain acted as a trigger for increased outflows; in the Eastern Balkans they intensified with EU-Membership as a consequence of the right to free labor mobility in the EU. But migration dynamics and directions changed recently, as the example of Romania documents.

Romania experienced net-emigration of its citizens to western EU-MS until about 2022, when return migration set in so that the migration balance of its citizens became positive. Bulgaria's development was somewhat different: while it also lost some of its workforce to western EU-MS after joining the EU, the turning point was reached earlier, namely in 2020, partly as a consequence of Covid and partly of Brexit, which sent Bulgarian migrants back home. Croatia is still in the early stages of EU membership and consequently experiencing net-outflows of its citizens, but net-emigration has been declining rapidly since 2018. The changing migration landscape in the EU-MS of the Balkans may be due to a successful catching-up process of the standard of living in Bulgaria, Romania and Croatia to western EU-standards, and of increased economic opportunities at home.

More recently, Bulgaria and Romania saw increased inflows of migrants from Russia, Ukraine and Türkiye – often with ethnic and historical roots in Bulgaria, respectively Romania, but also as a consequence of political turmoil flowing from the Russian war of aggression against the Ukraine.

A look into the crystal ball suggests that we will continue to face migration flows, at times as substantial as in 2015/16, but that we will be better prepared. Tado (2026) points out that the Western Balkans face a specific problem – they experience strategic ageing due to the loss of substantial portions of their skilled and young populations. This has negative consequences for the socio-economic development if not addressed by adequate political actions. Among them could be: stronger regional collaboration and migration partnerships to address labor shortages, also closer engagement with the diaspora and a support of return migration, as well as integration policies for migrants. Tado's report envisages two trajectories for the socio-economic future by 2035: one refers to a possible integration into the EU which implies institutional reforms ahead of membership, access to the Single Market and free mobility of labor in consequence. Eastern Balkan countries provide testimony of positive socio-economic outcomes of EU-membership, after an at times difficult transition phase with significant outmigration. Given some time, the new EU-MS become fully integrated into a highly developed system of labor market and socio-economic institutions, which promote circular migration within an enlarged EU – as one may access

the best employment opportunities for one's skills anywhere in the EU while not having to settle, given portability of acquired pension and labor rights. Also, the catching-up process of the standard of living is promoted by generous EU-regional funds.

The second possible trajectory suggests a closer alignment with large political powers like China, USA or Russia. While access to these large third country markets may be difficult, the dependence on their investment may be crucial for economic survival. The implications for migration are unclear but immigration of citizens from China and Russia, to a lesser extent from the USA, except possibly of ethnic-religious diaspora, seems most plausible, given labor scarcities and population ageing in the Balkans. Hungary and Romania are good examples for Chinese settlements and business activities (Nyiri, 2003).

As political upheavals can happen quickly, refugee inflows into the EU may occur at short notice. This raises complex political, legal and humanitarian questions in four EU member states around the Balkan region, Bulgaria, Croatia, Greece and Romania, as they are lying on the outer fringes of the EU, making them particularly vulnerable. However, in case of a renewed massive inflow of refugees into the EU along the Balkan route, the EU has established a system of border controls and standardized asylum application centers at the border or in a safe country of transit. They may take the pressure off the borders of an uncontrolled mass of asylum seekers. After the claim for asylum has been processed, the accepted refugees may be transferred to the EU-MS of provisional settlement – according to a distribution plan for which the criteria are still to be clarified. In the eventual country of settlement, a differentiated standardized system of integration measures will be in place to help the refugees settle and integrate. Also, for circular EU-migrants a miniature integration package will be available, e.g. a welcoming package provided by the community and/or the employer, to promote a two-way integration, thereby promoting social cohesion and wellbeing for all.

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Between Borders: Türkiye's Triple Role in Europe's International Migration Regime and the Balkans

Ahmet İçduygu

Introduction

For a century Türkiye has been present in the European migration system in three capacities at once: as a country of emigration, as a country of immigration and as a country of transit. None of the three can be understood in isolation from the others. The central argument of this chapter is that Türkiye's place in Europe's international migration, and hence its impact on migration processes in the Balkans, becomes visible only when the three roles are considered together, in their historical sequence and in their present-day simultaneity. The country that received hundreds of thousands of Muslims and ethnic Turks from the Balkan lands in the early Republican period went on, after 1961, to send millions of workers to Western Europe and, since the 1990s, has gradually become a destination and transit corridor for movements from the Middle East, Asia, and Africa whose intensity directly determines the pressure along the Balkan routes toward the European Union (İçduygu and Kirişci, 2009; Elitok and Straubhaar, 2010).

This evolution bears directly on the theme of the present monograph. The Balkans were the original source of immigration to the young Turkish Republic, later became a secondary destination of Turkish emigration, and in the most recent period have served as the main overland corridor through which secondary movements from Türkiye reach the European Union. The border between Bulgaria and Türkiye is the busiest entry point of that corridor, a circumstance that links the Turkish case to the Bulgarian one examined in the chapter on Bulgaria in this monograph.

The analytical framework of the chapter rests on the historical-institutional approach developed in the author's earlier work (İçduygu and Kirişci, 2009; İçduygu and Aksel, 2013), which ties the country's successive migration patterns to the dominant state ideologies of each period. The empirical basis combines official Turkish statistics, data of the Turkish Statistical Institute (TurkStat) and of the Directorate General of Migration Management, transformed in 2021 into the Presidency of Migration Management, with harmonised international sources: data of UNHCR, Frontex and Eurostat, as well as findings from the secondary scholarly literature.

The exposition follows the chronology of the migration transition. The first section traces the historical foundations: the emigration of non-Muslims and the immigration of Muslims and Turks in the period 1923 – 1960, followed by labour emigration to Western Europe and the formation of the Turkish diaspora. The second section examines Türkiye's transformation into a country of immigration and transit after 1990 and the place of migration in relations with the European Union. The third section analyses the Europeanisation of Turkish migration legislation and institutions. The fourth section is devoted to the Syrian refugee presence after 2011 and to Türkiye's role in the intensity of movements along the Balkan routes. The concluding section draws the findings together through the prism of the Turkish-Balkan migration context.

Historical Foundations of the Migration Transition

The migration history of Republican Türkiye can be periodised into four successive regimes, each corresponding to a dominant state ideology (İçduygu and Aksel, 2013). In the period 1923 – 1960, under the sign of nationalism and statism, the country combined the emigration of its non-Muslim population with the deliberate immigration of Muslims and ethnic Turks, above all from the Balkans. In the period 1960 – 1980/90, in the context of developmentalism and economic liberalism, organised labour emigration to Western Europe was dominant. Between 1990 and 2010, under neo-liberal institutionalism, a significant immigration of foreigners who were neither Turks nor Muslims appeared for the first time, accompanied by growing transit flows. After 2010, the three forms have overlapped in mixed migration flows, in which emigration, immigration and transit proceed simultaneously, in an institutional environment combining neo-liberal elements with conservative accents on national and religious identity (Table 1).

Table 1. Periodisation of the migration regimes of Republican Türkiye

Period	Dominant migration flows	Dominant state ideology
1923 – 1960	Emigration of non-Muslims; immigration of Muslims and/or Turks	Nationalism, statism
1960 – 1980/90	Labour emigration (Muslims and/or Turks)	Developmentalism, liberalism
1990 – 2010	Immigration of foreigners (non-Muslims and/or non-Turks); transit flows	Neo-liberal institutionalism
Post-2010	Mixed flows: emigration, immigration and transit simultaneously	Neo-liberal institutionalism with conservative elements of nationalism and religious identity

Source: *İçduygu and Aksel (2013).*

Emigration of Non-Muslims and Immigration from the Balkans (1923 – 1960)

The first migration regime of the Republic was a direct extension of the demographic policy of nation-building. People of Turkish origin and Islamic faith were encouraged to migrate to Türkiye, while the non-Muslim communities left the country through forced exchanges, emigration agreements and gradual displacement. The programmatic formulation of this policy belongs to the MP Tunalı Hilmi, born in Targovishte, Bulgaria, who declared during the debate on the establishment of a ministry for "*population exchange, development and settlement" on 13 October 1923: "Let more than a hundred Turkish families come… let them build Anatolian villages on the shores of Anatolia… we have a countless number of Turks not only right beside us, in the Balkans, Aleppo and Damascus, but also as far away as Basra, Mecca and Yemen, and also in Egypt*" (quoted in İçduygu and Sert, 2015).

The scale of this resettlement was considerable. In the period 1923 – 1939, nearly one million people of Turkish origin and Islamic faith arrived in the country: around 200 thousand from Bulgaria, around 400 thousand from Greece, mainly under the Lausanne Convention on the compulsory exchange of populations of 1923, close to 150 thousand from Romania, and another 150 thousand or so from other parts of the Balkans (Kirişci, 1995; İçduygu and Sert, 2015). The inflow from the Balkans did not stop with the end of the interwar period. There followed the emigration wave from Bulgaria in 1950 – 1951 with 154,393 people, the departures under the 1968 agreement on the reunification of divided families, whose

estimates vary between 50 and 130 thousand depending on the source, and, at the close of the historical cycle under review, the great wave of the summer of 1989, when, by various estimates, between 300 and 360 thousand Bulgarian Turks crossed the border, examined in detail in the chapter on Bulgaria in this monograph (Kirişci, 1995; İçduygu and Sert, 2015). In cumulative terms, in the period 1950 – 1992 alone around 630 thousand Turks and other Muslims emigrated from Bulgaria to Türkiye, while around 300 thousand Turks and Slavic Muslims arrived from Yugoslavia in the period 1950 – 1966 (Fassmann and Münz, 1994; Kirişci, 1995).

The mirror image of this process was the contraction of the non-Muslim population. On the eve of the First World War, about 16 million people lived on the territory of today's Türkiye, of whom close to 13 million Muslims and about 3 million non-Muslims. The forced movements of the Armenian and Greek populations during and after the war, the exchange with Greece and subsequent emigration reduced the share of non-Muslims from 19.1% in 1914 to 2.5% already at the Republic's first census in 1927, to 1.5% in 1945 and to about 1%, or approximately 200 thousand people, by the middle of the century (İçduygu and Kirişci, 2009; İçduygu, Toktaş and Soner, 2008). The data are summarised in Table 2.

Table 2. Muslim and non-Muslim population in Türkiye, 1914 – 2005 (in thousands)

Group	1914	1927	1945	1965	1990	2005
Muslims	12 941	13 290	18 511	31 139	56 860	71 997
Greeks	1 549	110	104	76	8	3
Armenians	1 204	77	60	64	67	50
Jews	128	82	77	38	29	27
Others	176	71	38	74	50	45
Total	15 997	13 630	18 790	31 391	57 005	72 122
Share of non-Muslims (%)	19.1	2.5	1.5	0.8	0.3	0.2

Source: *İçduygu and Kirişci (2009, p. 2); İçduygu and Sert (2015).*

Within a single generation, then, the demographic face of the country was transformed: immigration from the Balkans and the emigration of non-Muslims operated as two sides of one and the same process of national homogenisation. This historical layer has had lasting consequences for the later periods. It created durable kinship and community ties between Türkiye and the Balkan states, which continue to feed the movement of people in both directions today, and it left an institutional legacy in the settlement legislation, which as late as 2006 preserved privileged access to settlement for persons of "Turkish descent and culture".

Labour Emigration to Western Europe (1961 – 1990)

The second migration regime unfolded under the sign of development. The export of labour was consciously adopted as an instrument of economic development: emigration was expected to ease pressure on the domestic labour market, to secure a flow of remittances and to build skills that returning workers would transfer into the Turkish economy (İçduygu, 2012). The institutional framework was built quickly. On 30 October 1961, the labour recruitment agreement with the Federal Republic of Germany was signed, followed by analogous agreements with Austria, Belgium and the Netherlands in 1964, with France in 1965, and with Sweden in 1967 (İçduygu, 2012).

In parallel with the bilateral agreements, the associative link with European integration was constructed. The Ankara Agreement of 12 September 1963 made Türkiye an associate member of the European Economic Community, with Article 12 providing that the parties be guided by the provisions of the Treaty of Rome with a view to the "gradual realisation of the free movement of workers" between them. The Additional Protocol of 1970, in force since 1973, specified in Article 36, a timetable for the staged introduction of that free movement between the end of the twelfth and the end of the twenty-second year after its entry into force. These provisions were never applied in full, but they have remained a legal and symbolic framework to which the Turkish side has returned in all subsequent negotiations with the Community and later with the European Union.

The dynamics of the flow were rapid. From the first few hundred workers at the end of 1961, the Turkish migrant community in Europe grew to more than half a million people by the early 1970s, almost two million by the early 1980s, more than two and a half million by the early 1990s, and over three million by the early 2000s (İçduygu, 2012). It is generally agreed that the halt to organised recruitment after the oil crisis of 1973 did not interrupt the flow but changed its composition: family reunification and marriage migration became the main channels of the continuing movement (İçduygu, 2012). A third channel opened after the military coup of 12 September 1980 and in the context of the Kurdish question: according to UNHCR data, close to one million Turkish citizens applied for asylum in European countries during the 1980s and 1990s (İçduygu, 2012). Already within this period, then, Turkish emigration diversified from purely labour-driven to labour, family and humanitarian migration.

The result of these overlapping waves is one of the largest diaspora communities on the continent. Today, over five million people of Turkish descent live in Europe, while the total number of Turkish citizens and people of Turkish origin abroad exceeds seven million, of whom around six million in Western European countries (Ministry of Foreign Affairs

of the Republic of Türkiye, 2026). Germany remains the largest host country, followed by France, the Netherlands and Austria. Over time the community has evolved from “guest workers” into a permanently settled, naturalised and transnational population. The formation of this diaspora also has a Balkan dimension: starting with the military coup of 1980, and increasingly with the 1990s, and especially over the last two decades, the Balkan countries have themselves become a destination of emigration from Türkiye; the scale and structure of this flow are examined in the synthesis section below.

For the sending country, the consequences of emigration have been mixed: neither altogether good nor altogether bad (İçduygu, 2012). On the one hand, migrants’ remittances were for decades a substantial source of external financing, and the diaspora became a factor in Turkish foreign policy and in bilateral relations with the host states. It is telling of the completed character of the Turkish migration transition that this channel is now practically exhausted: as of 2024, personal remittances amount to a mere 0.07% of the country’s gross domestic product, the lowest share among the Balkan economies (World Bank, 2026). On the other hand, the expectation that temporary labour migration would produce a mass return of skilled workers was fulfilled only in part: according to estimates of the Turkish foreign ministry, around three million Turkish citizens have returned to the country since the beginning of the process, but the core of the community has settled permanently in Europe (Ministry of Foreign Affairs of the Republic of Türkiye, 2026). It is precisely this permanently settled population that constitutes the first of the European Union’s two great migration-related “concerns” in the negotiations with Türkiye, discussed below.

Türkiye as a Country of Immigration and Transit (1990 – 2010)

The third migration regime arrived with the end of the Cold War. In the 1980s, and especially in the 1990s, incoming migration for the first time in the history of the Republic consisted predominantly of “foreigners” in the narrow sense of the word: people who were neither Turks nor Muslims and who did not fit the state’s settlement logic up to that point (İçduygu and Kirişci, 2009). Three groups of factors produced this turn. First, globalisation and the liberalisation of the Turkish economy after 1980 opened the country to the international movement of people, goods and capital. Second, political upheavals and economic transformations in the neighbouring regions, from Iran and Iraq to the collapsing Soviet bloc, turned Türkiye into a natural corridor and refuge: the country found itself a “passageway” for protection seekers and for migrants heading

towards Europe. Third, the collapse of the Soviet Union and of the socialist systems in Eastern Europe generated intensive temporary and circular labour migration, including the “suitcase trade” and the informal employment of citizens of the post-Soviet and Balkan states in the Turkish economy. Overlaid on these flows was the growing economic pull of Türkiye itself, whose economic development and political stabilisation attracted foreigners of different status to work, study or live.

Analytically, the incoming flows of this period can be grouped into four categories (İçduygu and Yükseker, 2012; Kirişci, 2003). The first are irregular labour migrants, above all from the post-Soviet space and from the neighbouring Balkan and Middle Eastern states, employed informally in construction, domestic services, tourism, and the textile industry. The second are transit migrants using Turkish territory as a stage in their movement towards the European Union. The third are asylum seekers and refugees, whose situation is complicated by the geographical limitation that Türkiye maintains under the 1951 Geneva Convention: full refugee status can be granted only to persons fleeing events in Europe, while non-European applicants from the Middle East and Asia receive temporary forms of protection pending resettlement in third countries. The fourth category are regular migrants: professionals, students, retirees and marriage migrants settling in the country through legal channels. The four categories are not watertight: one and the same person not infrequently shifts from transit to irregular labour migrant, or from asylum seeker to transit migrant, and it is precisely this mutual convertibility that makes the management of the flows so difficult.

The country’s new role acquired strategic significance in the context of European integration. In December 2004, the European Council set a date for the opening of negotiations, and on 3 October 2005, Türkiye formally began negotiations for full membership. In its Recommendation of 6 October 2004 on Türkiye’s progress towards accession, the European Commission formulated the Union’s two migration-related concerns. On the one hand, “studies give varying estimates of expected additional migration following Turkey’s accession”, for which reason “long transition periods and a permanent safeguard clause can be considered to avoid serious disturbances on the EU labour market”; at the same time, “the population dynamics of Turkey could make a contribution to offsetting the ageing of EU societies” (European Commission, 2004). On the other hand, the Commission stressed the need for “management of the EU’s long new external borders”, for compliance with the European migration and asylum regime, and for the fight against organised crime and trafficking in human beings. In other words, the Union’s two “concerns” reproduce exactly Türkiye’s dual profile: the country as a potential source of labour under free movement, and the country as a receiving and transit belt along the Union’s external border. It is on this duality that the entire

subsequent architecture of relations was built, including the linkage of readmission to visa liberalisation examined in the next section.

Europeanisation of Migration Policy: Legislation and Institutions

The membership perspective triggered a process that may be described as the "EU-isation" of Turkish migration governance: a gradual alignment of legislation, institutions and administrative practices with the acquis of the Union (İçduygu, 2007; İçduygu and Aksel, 2013). As early as 2003, the Law on Work Permits for Foreigners (Law No. 4817) was adopted, creating for the first time a unified regime for foreigners' access to the Turkish labour market and transferring the issuing of permits to the Ministry of Labour. In 2005, a National Action Plan on Asylum and Migration was adopted, setting out the roadmap for harmonisation with European standards. The Settlement Law of 2006 (Law No. 5543) modernised the historical settlement legislation but reserved the right to permanent settlement for persons of "Turkish descent and culture", thereby preserving the ethno-cultural core of the traditional immigration policy.

The culmination of this legislative cycle is the Law on Foreigners and International Protection (Law No. 6458), adopted in April 2013. For the first time in Turkish legal history it has codified a comprehensive regime of migration and asylum: it regulates visas, residence permits, removal and detention, introduces the statuses of "refugee", "conditional refugee" and "subsidiary protection", and establishes a specialised civilian administration, the Directorate General of Migration Management under the Ministry of Interior, which took over all immigration operations from the police structures[1]. Notably, the law was drafted and adopted before the culmination of the Syrian crisis: when Syrian citizens began to arrive en masse, the Europeanisation of the Turkish migration regime was already under way, a circumstance that explains the country's relatively rapid institutional response.

In parallel with internal harmonisation, the treaty-based link with the European Union also developed. On 16 December 2013, the EU and Türkiye signed the Readmission Agreement, which regulates the return both of own nationals and of third-country nationals who have passed through Turkish territory, with the aim of countering irregular migration flows. The agreement was concluded explicitly "in return" for the simultaneously launched Visa Liberalisation Dialogue, which envisages a visa-free regime for Turkish citizens upon fulfilment of 72 benchmarks.

[1] In 2021, the Directorate General of Migration Management was transformed into the Presidency of Migration Management (Göç İdaresi Başkanlığı).

This linkage is central to understanding the subsequent dynamics: readmission is the European interest, visa liberalisation, the Turkish one, and the two were constructed as mutual counter-obligations. Thirteen years later, however, visa liberalisation has still not materialised, while the application of the readmission agreement has in practice been blocked, sustaining a durable tension in relations. The third element of this treaty architecture, the EU-Türkiye Statement of 18 March 2016, belongs to the following period and is examined below.

The Period after 2011: Syrian Refugees, the 2016 Statement and the Balkan Routes

The Arrival of Syrian Refugees and the Temporary Protection Regime

The fourth migration regime is marked by the largest refugee movement in the history of the republic. The first Syrian citizens fleeing the civil war arrived in April 2011 and were met with an "open door" policy, based on the expectation that the conflict would be short-lived (İçduygu, 2015). The dynamics, however, exceeded all forecasts. According to the Directorate General of Migration Management, the number of Syrians under protection in Türkiye grew from 14,237 at the end of 2012 to 224,655 at the end of 2013, 1,519,286 at the end of 2014, 2,503,549 at the end of 2015 and 2,834,441 at the end of 2016, reaching 3,426,786 in 2017, 3,623,192 in 2018, and 3,635,841 in 2019 (Table 3; Figure 1). With this, Türkiye became the country hosting the largest refugee population in the world, a position it retained for almost a decade.

Table 3. Syrian citizens under temporary protection in Türkiye, 2012 – 2019 and 2026 (end of year, number of persons)

Year	Number
2012	14 237
2013	224 655
2014	1 519 286
2015	2 503 549
2016	2 834 441
2017	3 426 786
2018	3 623 192
2019	3 635 841
2026 (May)	2 280 542

Source: *Presidency of Migration Management (2026); until 2021, Directorate General of Migration Management.*

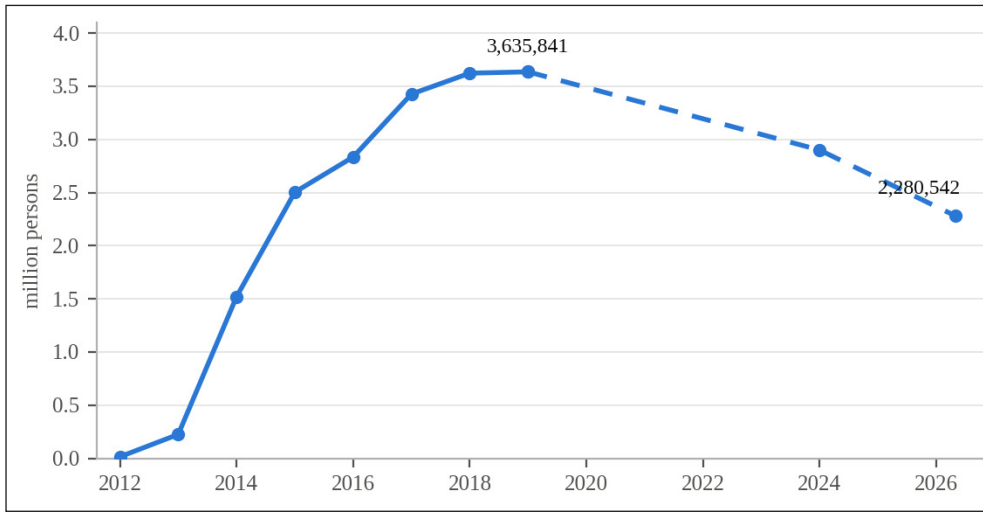


Figure 1. Syrian citizens under temporary protection in Türkiye, 2012 – 2026 (million persons)

Source: *Presidency of Migration Management (2026); for 2024: UNHCR (2026). The dashed line marks the period with incomplete annual data.*

The legal response to this inflow was built on the foundations of the already adopted Law on Foreigners and International Protection. Since the geographical limitation under the 1951 Convention rules out full refugee status for non-European citizens, in October 2014, the Temporary Protection Regulation was adopted, granting Syrian citizens a collective temporary protection status with access to healthcare, education and social services. In January 2016, the Regulation on Work Permits for Persons under Temporary Protection was adopted, opening formal access to the labour market. Within five years, then, Türkiye constructed a comprehensive, if *sui generis*, protection regime, situated entirely outside the full scope of the Geneva Convention yet modelled on European standards.

The 2015 Crisis, the EU-Türkiye Statement and the Balkan Route

Türkiye's role in the intensity of movements through the Balkans became evident in 2015, when the accumulated Syrian, Afghan and Iraqi population headed en masse towards the European Union. In 2015, Frontex registered a total of 1,822,337 detections of illegal border crossing at the Union's external borders, of which 885,386 on the Eastern Mediterranean route, mainly across the Aegean from the Turkish coast to the Greek islands, and 764,038 on the Western Balkan route,

which represented above all a continuation of the same flow through the territory of North Macedonia, Serbia and Hungary (Frontex, 2016). The two routes function as communicating vessels: almost the entire movement through the Balkans in 2015 was a secondary movement of people who had entered the Union across the Greek-Turkish sea border. It is precisely this mechanism that turns Turkish policy on containing or releasing the flows into a decisive factor for migration pressure on the Balkan states, including Bulgaria.

The Union's response was the EU-Türkiye Statement of 18 March 2016 (European Council, 2016). It provided for the return to Türkiye of all new irregular migrants arriving on the Greek islands, the resettlement in the Union of one Syrian refugee from Türkiye for every Syrian returned (the "one for one" principle), financial support of 3 plus 3 billion euro under the Facility for Refugees in Turkey, as well as commitments to accelerate visa liberalisation and to re-energise the accession process. In quantitative terms the effect was immediate: detections on the Eastern Mediterranean route fell to 182,277 in 2016 and 42,305 in 2017, and on the Western Balkan route to 130,261 in 2016 and 12,178 in 2017 (Frontex, 2018). In political terms, however, the Statement institutionalised an asymmetric interdependence: the Union obtained effective control over the flows, Türkiye obtained financing and political leverage, while the promised counter-obligations, visa liberalisation and the modernisation of the customs union, remained unfulfilled. This construction has proved durable but fragile: at every moment of strain in relations, the Turkish side has the option of loosening control, as shown by the episode of February–March 2020 at the border near Edirne and by the periodic peaks of pressure on the Bulgarian-Turkish and Greek-Turkish borders.

That Türkiye's role remains structural rather than episodic is evident from the renewed pressure of the early 2020s. In 2022, Frontex registered 331,553 detections of illegal entry at the external borders, of which 144,197 on the Western Balkan route, with Syrians and Afghans as leading nationalities, and with Turkish citizens among the top three nationalities on the route, 30,428 on the Eastern Mediterranean land route, and 13,478 on the sea route (Frontex, 2023). The presence of Turkish citizens themselves among the leading nationalities of irregular crossings is a new and telling element: it reflects the post-pandemic economic crisis and political tension in the country, and it means that Türkiye's emigration role is now being reproduced in irregular form as well.

The subsequent dynamics confirm the non-linear character of the pressure (Figure 2). After a new peak in 2023, when irregular entries on the three main routes towards the Union reached around 275 thousand, with a relatively modest share for the Balkan direction (around 60 thousand),

by 2025, the total fell to around 155 thousand, of which roughly one third along the direction through the Balkans and the Eastern Mediterranean (Frontex, 2026). The same contraction is visible from the Serbian perspective: according to data presented in the chapter on Serbia in this monograph, in 2024, only 19,483 migrants passed through Serbia, a fall of 82.1% on the previous year, with Turkish citizens, at 11.95% of those passing through, the third largest nationality after Syrians and Afghans.

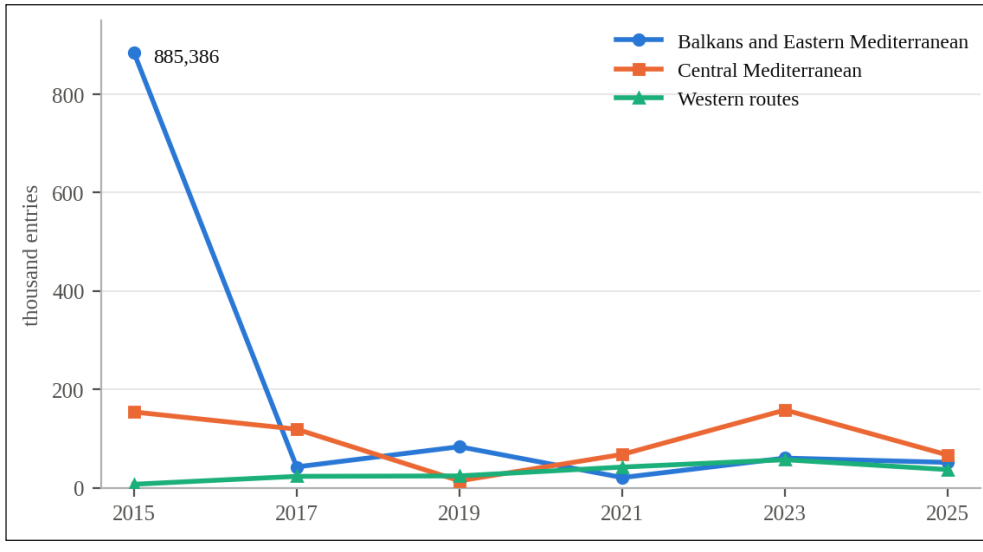


Figure 2. Irregular entries into the European Union by main route, 2015 – 2025 (thousands)

Source: *compiled from Frontex data (2016; 2018; 2026).*

Micro-level data confirm Türkiye's central place in the architecture of the route. According to a survey by the International Organization for Migration among migrants transiting the Western Balkans, 40% had passed through Türkiye, with a median length of stay of 207 days; 72% of them had not been registered by the Turkish authorities in any form, 69% remained without work during their stay, and 70% state that they had from the outset regarded Türkiye solely as a transit country (IOM, 2026). Among the corridors of entry into the region, the largest share belongs to the Libya–Greece route (43% of respondents), followed by Türkiye–Greece (24%) and Türkiye–Bulgaria (14%), while the median price paid to smugglers for the Türkiye–Greece leg reaches 5 thousand euro, against 3.5 thousand euro for the Iran–Türkiye leg (IOM, 2026). These data depict Türkiye not as a short corridor but as a prolonged waystation, where a stay of many months combines with an almost

complete absence of formal status, which in turn feeds the decision to continue towards the European Union.

The Turn after 2024

The fall of the Assad regime in December 2024 opened a new phase. According to the Turkish authorities, by the spring of 2026 a total of 667,565 Syrian citizens had returned voluntarily to Syria, while UNHCR estimates returns from Türkiye at around 640 thousand; the number of persons under temporary protection in Türkiye fell to 2,280,542 as of May 2026, against about 2.9 million at the end of 2024 (UNHCR, 2026; Presidency of Migration Management, 2026). Whether this downward dynamic proves durable depends on stabilisation in Syria, but it is already changing the parameters of the debate: for the first time since 2011 the Syrian presence in Türkiye has been shrinking in absolute terms, and with it one of the main reservoirs of potential secondary movements through the Balkans has been weakening.

Türkiye and the Balkans Today: A Synthesis

Taken together, Türkiye's three roles trace a dense network of ties with the Balkan region that operates through all migration channels simultaneously. One can summarize the current state of the migration regime linking Türkiye and the Balkans in the following *four* points. *First,* the historical legacy of the resettlements remains present in the demographic structure of Türkiye itself. The Bulgarian-born form one of the most numerous communities of foreign-born residents of the country: according to UN estimates, as of 2024, around 348 thousand Bulgarian-born persons live in Türkiye, more than in any other single country of the Bulgarian diaspora, with the group gradually shrinking as the 1989 émigré generation ages (UN DESA, 2024). Smaller communities originating from North Macedonia and other Balkan states are also present. The living link of this legacy is also visible in the pension system: at the end of 2023, 12,023 people received Bulgarian pensions under the bilateral agreement between Bulgaria and Türkiye, a legacy of the 1989 wave, with a fall of 4.5% year on year reflecting the natural passing of the émigré generation (National Social Security Institute, 2025; see also the chapter on Bulgaria in this monograph). In mirror image, the legacy also works in the opposite direction: as the chapter on Bulgaria in this monograph shows, Turkish citizens are among the leading acquirers of Bulgarian citizenship, with 2,163 cases in 2024, 3,113 in 2025 and a total of 12,357 for the period 2012 – 2025, to a significant extent the

restoration of citizenship by descendants of émigrés (Administration of the President of the Republic of Bulgaria, 2025).

Second, short-term circulation between Türkiye and the Balkan states is massive and growing. According to Turkish border statistics, arrivals of citizens of Balkan countries in Türkiye grew from 5,154,654 in 2019 to 5,821,919 in 2024, with citizens of Bulgaria being the most numerous, at 2,713,464 entries in 2019 and 2,918,581 in 2024, followed by those of Romania, at 763,320 in 2019 and 1,173,358 in 2024, and of Greece (Table 4; Ministry of Culture and Tourism, 2025). The symmetry between arrivals and departures shows that this is above all short-term circulation: shopping, tourism, family visits, and petty trade rather than lasting migration. This dense circulation is the practical expression of the historical ties described above, and at the same time the infrastructure upon which, under changed conditions, more lasting forms of movement could develop.

Table 4. Arrivals and departures of citizens of Balkan countries, Türkiye, 2019 and 2024 (number)

Country	Arrivals 2019	Departures 2019	Arrivals 2024	Departures 2024
Albania	134 869	135 697	159 828	160 465
Bosnia and Herzegovina	144 445	144 197	197 388	196 867
Bulgaria	2 713 464	2 718 145	2 918 581	2 923 525
Greece	836 882	823 211	707 133	707 386
Romania	763 320	761 865	1 173 358	1 167 950
North Macedonia	222 862	222 358	246 626	246 630
Serbia	282 347	283 211	342 002	341 923
Croatia	56 465	56 417	77 003	76 677
Balkans total	5 154 654	5 145 101	5 821 919	5 821 423

Source: *Ministry of Culture and Tourism of the Republic of Türkiye (2025), border statistics on entries and exits of foreign visitors. Data for Kosovo and Montenegro not available.*

Third, Türkiye's transit role remains decisive for migration pressure on the region. The Balkan route in its two variants, the maritime one across the Aegean with subsequent overland movement and the direct overland one across the Bulgarian-Turkish and Greek-Turkish borders, depends critically on the size of the émigré reservoir in Türkiye and on the intensity of Turkish border control. Each of the three phases examined above, the 2015 crisis, the stabilisation after the 2016 Statement and the renewed pressure of the early 2020s, is imprinted directly in the statistics of apprehensions at the Bulgarian and Serbian borders. In this sense,

Turkish migration policy is an external variable of Balkan migration governance: decisions taken in Ankara set the parameters within which the border and asylum systems of Sofia, Belgrade and Skopje operate.

Fourth, emigration from Türkiye itself is acquiring a new Balkan dimension. Alongside the historical diaspora in Western Europe, a new, smaller but qualitatively different emigration wave has been forming since 2010, and it is now clearly measurable in the statistics of the receiving Balkan states. Turkish citizens are the third largest group of registered foreign workers in Romania, growing from 6,888 at the end of 2020 to 11,601 at the end of 2024 (Romanian Labour Inspectorate, 2025), the second largest origin country of third-country labour in Bulgaria with 3,534 permits and positive rulings in 2024, predominantly seconded specialists and engineering staff in construction and transport, alongside seasonal workers in tourism (Employment Agency of Bulgaria, 2025), and the third largest group of foreigners in Serbia with around 3 thousand people in 2023 (see the chapter on Serbia in this monograph). Remarkably, this flow is sustained at an unemployment rate in Türkiye itself of around 8.8% (Eurostat, 2026), which suggests that not only purely economic but also historical, kinship and entrepreneurial motives are at work. In parallel, the participation of Turkish citizens in the irregular flows along the Western Balkan route after 2021 shows that the emigration potential extends also to groups for whom the legal channels are closed. The circle closes: the country that began the century as a receiver of Balkan émigrés ends it, and begins the new one, as a source of new settlements in the Balkans.

Conclusion

The past century has transformed Türkiye from a demographic receiver of the Balkan Muslim population into a pivotal element of the European migration regime, combining simultaneously the three roles of sending, receiving and transit country. The analysis in this chapter permits three generalisations.

First, the three roles are not successive phases replacing one another but overlapping layers. The emigration role, institutionalised with the 1961 agreement with Germany and the 1963 Ankara Agreement, continues to operate through family reunification, marriage migration and the new wave of the 2010s. The immigration role, historically rooted in the reception of Muslims and Turks from the Balkans, became universalised after 1990 and acquired unprecedented scale after 2011 with the Syrian refugee presence. The transit role, arising from the country's geographical position between the zones of instability and the European space of prosperity, is activated with every regional crisis. Managing

any one of the three roles inevitably affects the other two, which makes Turkish migration policy structurally multi-tasking and explains its internal tensions.

Second, relations between Türkiye and the European Union in the field of migration are built on an exchange that remains unfinished. The chain running from the 2013 Readmission Agreement through the Visa Liberalisation Dialogue to the Statement of March 2016 functions as a mechanism for the externalisation of European border control in exchange for financing and political concessions, but the key counter-obligation, the visa-free regime for Turkish citizens, has not been delivered for more than a decade. This asymmetry gives the whole construction a conditional and reversible character, which has repeatedly manifested itself in episodes of controlled loosening of border control.

Third, for the Balkans Türkiye is at once a historical reservoir of population, a neighbour with dense everyday circulation and a regulator of transit pressure. The Bulgarian-born are among the most numerous foreign-born communities in Türkiye, Bulgarian citizens are the most numerous Balkan visitors to the country, and the Bulgarian-Turkish border is the main overland entrance of the Balkan route. Few pairs of neighbouring states in Europe are linked by such a multi-layered migration interdependence. Understanding it, and hence governing it jointly, requires precisely the perspective proposed in this chapter: Türkiye should be thought of not as an external factor of Balkan migration but as its internal, constitutive element, whose three roles, as a country of emigration, immigration and transit, will continue to shape the dynamics of human movement in the region for decades to come.

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The Balkan Palimpsest: Greece and the Transforming Landscapes of Migration

Eda Gemi

Introduction

Migration has been a part of Greece's modern history for a long time, but the meaning of and the management of migration has changed profoundly over time. Between 1991 and 2010, Greece emerged as a new country of immigration, significantly reshaped by the influx of people from the Balkans, particularly Albanians, Bulgarians, Romanians and other post-socialist migrants. This period was characterised by labour-based mobility, recurrent regularisation campaigns and a precarious legal status which made migrants visible in the fields, on building sites and in households, but invisible in politics and policy. Migration was perceived as transitory and instrumental, an economic adjustment, not a national priority.

The years 2010 – 2025 represent a qualitatively different epoch, when migration moved from the edges to the very centre of governance, politics and identity. The fifteen-year period was punctuated by a succession of crises which exposed the limits of ad hoc management, reshaped institutions and put migration in the spotlight at national and European level.

The hinge year of 2010 captures this transformation in a striking way. The eruption of the sovereign debt crisis devastated Greece's labour market and state capacity, leading many long-settled migrants to return or move onwards (Gemi, 2026). The Law 3838/2010 opened also new citizenship pathways for the second generation (Government of Greece, 2010). Inclusion and exclusion were held in tense balance, a premonition of the stormy years ahead.

Migration was politicised as a weapon at the height of austerity decade of 2010 to 2014. The existence of migrants was instrumentalized by right-wing and far-right parties, with the rise to parliamentary power and subsequent collapse due to criminal convictions of Golden Dawn being a case in point. Language and public discourse on migration became increasingly fear-driven, creating the conditions for populist manipulation.

The refugee emergency of 2015 – 2016 thrust Greece onto the global stage. Over a million arrivals revealed governance gaps and compelled the EU-Turkey Accord, a watershed in asylum management that particularly affected the islands and unaccompanied minors.

Greece was thrust onto the world map by the refugee emergency of 2015 – 2016. The arrival of over a million people exposed governance gaps and forced the EU-Turkey Accord, a watershed in asylum management that had a particular impact on the islands and on unaccompanied minors. Between 2017 and 2025, governance structures seemed to consolidate and Europeanise. Fragility was always present, however, with a series of events such as the suspension of asylum applications in 2020, the COVID-19 pandemic and its impact on reception and integration systems and the renewed suspension of asylum rights in 2025 in response to the Libya-The Crete flows all showed the persistence of 'states of exception' as a recurrent strategy of governance. Underneath these pressing challenges was the more slowly-burning structural problem of demographic decline, slowly recontextualizing migration from a perceived burden into a potential lifeline for Greece's social contract and sustainability.

In a word, if the years 1991 – 2010 were about settlement and marginal incorporation, the years 2010 – 2025 are about migration at the heart of governance and politics, demonised and instrumentalised, feared and needed, excluded and included. Migration thus became Medusa's Mirror, a surface in which Greece saw reflected its most profound economic anxieties, political conflicts and demographic dilemmas.

This chapter draws on the author's contribution to the OECD Expert Group on Migration (SOPEMI) 2023 – 2025 (Gemi, 2023, 2024, 2025) of the OECD, combining statistical data with conceptual insight to demonstrate how Greece swayed between emergency-driven reactions and gradual emergence of governance frameworks and how migration was both a mirror and a magnifier of the country's transformations.

The chapter is organized into four interdependent analytical dimensions. The first one looks at the migration transformation of Greece by placing it in the wider Balkan migration system and the historical changes that followed the collapse of the Iron Curtain in the 1990s. The second considers the evolution of migration governance, from post-crisis recovery to a more selective labour migration policy. The third focuses

on the developments in asylum governance, securitisation and border politics. Finally, the fourth addresses integration, citizenship and the rise of a post-migrant era with a specific focus on labour market integration and pathways to citizenship.

Setting the Stage: Greece's Migration Transformation

To grasp contemporary migration in Greece, we must go beyond descriptive accounts of arrivals, departures and policy reforms. Migratory movements, however, are not just demographic in nature, but are part of multi-dimensional processes embedded in larger social, economic and political transformations. Theoretical perspectives in migration studies provide important analytical tools to understand these dynamics.

One of the most influential approaches has been the migration transition theory (Zelinsky, 1971). De Haas (2010) argues that migration transitions occur within the framework of wider processes of economic development, political transformation and international market integration. As societies develop mobility first goes up and then stabilizes or changes direction. Greece is a particularly interesting case because it underwent a relatively quick migration transition. It was characterized by mass emigration to Northern Europe, North America and Australia throughout much of the twentieth century. However, after the collapse of the socialist regimes in Eastern and Southeast Europe, Greece became a major destination for migrants from the neighbouring Balkan countries (Gemi, 2019; Gemi and Triandafyllidou, 2021).

The Southern European migration model provides additional insights. Scholars (King and Black 1997; Iosifides and King, 1999; King, 2000; Baldwin-Edwards, 2004, 2012) have argued that the 'southern model' of immigration share several distinctive characteristics in their migration experiences. These include extensive informal labour markets, strong demand for migrant labour in low-skilled sectors, weak integration policies, and repeated regularisation programmes. Migration governance often developed reactively rather than strategically, reflecting the speed with which migration transformed societies that had previously viewed themselves primarily as countries of emigration.

Hollifield's (2004) notion of the migration state offers another useful way to think about migration governance in Greece. In this approach, migration policies are formed by a constant tension between economic and sociological forces on one side and politics and legal constraints on the other (p. 885). States need migrants to grow economically, to fill gaps in the labour market and to compensate for falling populations. At the same time, governments face political pressures to manage borders, control immigration, and sustain public confidence in state sovereignty,

as well as to pursue regional integration and establish multilateral institutions to address the difficulties caused by migration.

Finally, securitisation theory offers a specific lens to understand the growing linkage of migration to security concerns. According to Buzan et. al (1998), issues are securitized when political actors manage to frame them as existential threats that require extraordinary actions. In Europe, and particularly in Greece, migration has been increasingly framed in terms of border security, irregular migration, trafficking networks and national identity. This trend was reinforced by the refugee crisis of 2015 – 2016 when migration became a core issue of national and European security governance rather than a matter of the labour market.

Based on this theoretical discussion, it is argued that migration in Greece should be understood not only as a population movement, but as a mirror of wider transformations in state capacity, economic restructuring, demographic change, its geopolitics in the Balkans, and European integration.

Greece in the Balkan Migration System

For one to understand Greece's contemporary migration history, the latter has to be placed within the wider geographical and geopolitical context of the Balkans. Greece's role as a gatekeeper to Europe has often obscured the fact that the country's transition to an immigration society was in large part linked to developments in Southeastern Europe following the collapse of the Iron Curtain.

The fall of the Cold War led to one of the biggest migratory movements of modern European history. For decades, crossing the borders across the Balkans had been strictly controlled and international mobility remained the exception, not the rule. But the collapse of communist regimes after 1989 did more than just open up previously closed borders. It fundamentally changed the political, economic and social landscape of Southeastern Europe. Migration across the region was strongly encouraged in this context by the transition to market economies and the accompanying economic restructuring, political uncertainty, rising unemployment and increasing income inequalities. Migration thus became not only a survival strategy for many households, but also one of the defining features of the post-socialist transformation.

Albanian migration to Greece reached unprecedented levels against the backdrop of this rapidly shifting regional scene (Gemi and Triandafyllidou, 2021; Gemi, 2019; Maroukis and Gemi, 2013). The opening of the Albanian-Greek borders in the early 1990s started a migration movement that would have a long-term effect on both countries. It is in this context that Albanian migration to Greece became the dominant migration movement of the post-socialist Balkans. The

scale and speed of the movement were unprecedented, changing the demographic, economic and social fabric of both countries. In just a few years, hundreds of thousands of Albanians moved to Greece, the largest immigrant community in the country by far.

Even more importantly, this migration has had a profound impact on the Greek labour market. Whole sectors of the economy, such as agriculture, construction, tourism, domestic work, and care work, became increasingly dependent on migrant labour, much of it coming from Albanians who initially had no regular legal status. Despite their vital contribution to the economic development of Greece, paradoxically, many migrants found themselves caught in precarious forms of employment characterized by informality, limited social protection and restricted political participation (Gemi, 2018, 2019).

The economic consequences of Albanian migration were immediately visible, but its social implications were no less radical. Population movement also contributed to the creation of a transnational Balkan social space in which families, businesses and communities built dense cross-border networks. Over time, these networks maintained patterns of circular, seasonal and cross-border migration, especially in border regions, which allowed migrants to preserve long-term social, economic and emotional ties with Albania while simultaneously becoming embedded in Greek society.

However, the Balkan migration landscape was far from homogeneous. The migration of Bulgarians and Romanians took place under different political and institutional circumstances. While these communities were still much smaller than the Albanian population, they did become an important part of Greece's immigration story. EU enlargement fostered a new logic of mobility, replacing a migration bound by national borders with movement increasingly determined by European citizenship and freedom of movement. Greece in this context was a final destination, but also a stop within wider European mobility circuits. All these developments have led to the development of a distinctive Balkan migration (sub) system in which regional interconnectedness and European integration developed as mutually reinforcing processes. Greece plays a key role in this changing context as a destination country, transit space and regional labour market hub. Migration was not simply a matter of moving populations around. It reshaped economic structures, demographic patterns, and social relations across the region.

This Balkan dimension has a lasting effect, still visible in Greece today. Recent migration statistics show that Albanians remain the largest foreign population in the country, making up over half of all migrants legally residing here. At the same time, rising rates of naturalisation among second-generation migrants point to a wider process of settlement and integration which has slowly transformed what was labour migration into

a permanent element of Greek society. In this respect, the post-socialist migration flows of the 1990s have become a defining feature of Greece's current demographic and social landscape. The Greek economic crisis of the 2010s brought another layer of complexity to these migration dynamics. As unemployment increased steeply, some migrants returned to their countries of origin, while others sought new opportunities via onward migration to Northern Europe. However, these movements did not fundamentally change the migration transformation that had taken place since the early 1990s. Indeed, they highlighted the robustness of the migration system that had developed over the previous 20 years. The Greece of emigration had been transformed into a Greece of immigration, and this change was irreversible.

The Balkan migration experience is important far beyond demographic change and interregional mobilities. Its most significant legacy was the creation of the institutional, political and social conditions that would shape Greece's subsequent migration trajectory. From this perspective, the refugee arrivals of 2015 were not a rupture with the past but a continuation of a process of transformation that had begun with the post-socialist reconfiguration of the Balkans. The country's status as a migration crossroads had already been firmly established, what changed was the composition of migration flows.

The following sections will explore the historical roots of the present migration landscape, as highlighted between 2023 and 2025, and how these roots intersected with the refugee crisis, demographic decline, labour shortages, and changing European migration governance, as Greece's position at the crossroads of the Balkans and the European Union.

From Post-Crisis Recovery to Selective Immigration Policies

Policy reforms undertaken during 2023 – 2025 reflect Greece's efforts to recalibrate its labour migration and investment-based residence policies. These reforms sought to strike a balance between the needs of the labour market, while also overhauling the Golden Visa programme to put a focus on sustainable investment and deter speculative real-estate practices.

The new Immigration Code (Law 5038/2023) is the biggest reform in years of Greece's migration laws and aims to modernise the management of migration and make it more consistent with EU rules, especially Directive (EU) 2021/1883 (Ministry of Migration and Asylum, 2023a). The Code's main provisions include the restructuring of the residence permit system, allowing third-country nationals legally residing in the country

to change the categories of their permits. This included extending the duration of residence permits to ten years and including young adults who had completed their education in Greece, thus strengthening the legal status of second-generation migrants.

The most important legislative development was the introduction of a regularisation scheme in December 2023, which granted three-year residence and work permits to undocumented migrants who satisfied minimum residency requirements. The temporary measure, to be in force until the end of 2024, reflected a pragmatic policy shift to address persistent labour shortages while partially formalising long-standing irregular stays. Its introduction in 2024 began a wider reorientation of the governance of labour migration, opening the door for more reforms in the management of legal migration channels.

In this broader context, at the end of November 2024, the Ministry of Migration and Asylum announced the introduction of a centralised electronic system for the submission of employer applications to recruit third-country nationals, including highly skilled workers (Ministry of Migration and Asylum, 2024a).[1] The digitalisation of admission procedures went hand-in-hand with a broader policy focus on the needs of the labour market. Labour migration also came particularly under the spotlight again as shortages became more and more acute in agriculture, tourism, construction, and other seasonal sectors (Ministry of Labour and Social Security, 2023). The Code also established a simpler procedure for the admission and residence of seasonal workers. This enables them to work for up to nine months a year and makes employers responsible for good living conditions and evidence of employment (Government of Greece, 2024a).

Greece has also prioritized the implementation of bilateral labour mobility agreements in an effort to face the chronic labour shortages, especially in the agricultural sector (Government of Greece, 2023). This has resulted in the operationalization of the Bilateral Agreement between Greece and Egypt on the entry and residence of Egyptian nationals for seasonal agricultural employment (Ministry of Labour and Social Security, 2024). The deal would let as many as 5,000 Egyptian seasonal workers into the country in the first year of its operation. Greek employers can now apply for the recruitment of Egyptian seasonal workers through a special electronic platform (Ministry of Migration and Asylum, 2024b). These measures were complemented by Decision 133226/2024 establishing the conditions for highly skilled employment under the EU Blue Card

[1] The platform is accessible through the Ministry's digital portal, and the employers can use it to submit applications under five categories of admission: highly skilled employment (E1), intra-corporate transfers (E2), special-purpose employment (E3), dependent employment (E4) and seasonal work (E5).

scheme and requiring employers to demonstrate their financial capacity to meet salary obligations through the submission of tax declarations with a minimum annual gross income of €60,000 per employee (Government of Greece, 2024b). Similarly, other legal migration pathways such as the one for digital nomads underwent further regulatory changes that increased eligibility criteria (e.g. evidence of remote employment and adequate financial resources).

Simultaneously, the conditions for the acquisition of long-term resident status were further specified with the introduction of a minimum income threshold equivalent to fourteen months of the statutory minimum wage, together with documentary evidence of tax and social security compliance in the previous year (Siopi, 2024). As mentioned above, the reform agenda was further expanded by a series of legislative and regulatory initiatives that increasingly linked legal migration to broader economic and development objectives. The reorientation of investment migration was particularly evident with the introduction of the new Type B.6 residence permit for third-country nationals investing at least €250,000 in Greek start-ups.[2]

Simplified administrative procedures and the extension of family reunification rights accompanied the new permit, which aimed to reposition investment migration away from traditional real estate investment by promoting entrepreneurial activity, innovation and long-term settlement (Government of Greece, 2024c). The shift introduced significant changes to the Golden Visa scheme. The minimum threshold for real estate investment has been increased to €800,000 in high-demand areas, including Attica, Thessaloniki and the country's most popular islands. In addition to these, the scheme also banned the use of properties acquired under it for short-term rentals through platforms like Airbnb (Government of Greece, 2024d). The rationale behind these measures was to channel investment towards more productive sectors of the economy and to relieve speculative pressure in the housing and tourism markets (Greek Residency, 2024).

The impact of these reforms became evident between 2023 and 2025, when Greece's Golden Visa programme expanded rapidly, reflecting both growing investor demand and a substantial increase in family-related migration associated with the scheme. During this period, the combined number of first residence permits and renewals increased by 76.8%. Residence permits granted to family members consistently exceeded those issued to primary investors, suggesting that the programme has gradually evolved beyond a narrowly defined investment incentive into a broader pathway for long-term residence and family settlement.

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[2] The reforms granted a five-year residence permit for a minimum investment of €250,000 in Greek startups.

This exponential growth is probably a reflection of broader geopolitical and economic dynamics, including strategic alliances, not least Greece's growing defence and energy ties with Israel, as well as targeted post-Brexit outreach to investors in the UK. The rise in the number of residence permits issued to nationals of Western and Middle Eastern countries also indicates a greater reliance of patterns of participation on diplomatic relations, regional instability and cross-border capital mobility. By contrast, applications from nationals of sanctioned or politically isolated states have decreased, reflecting the impact of international sanctions regimes and regulatory compliance frameworks.

Politically, the rapid expansion of the programme and its wider socio-economic spillovers have engendered increasing public contestation. As the scheme has grown in scale and profile, it has evolved from being seen primarily as a post-crisis recovery device to a locus of debate on inequality, transparency and housing affordability. Its main opposition party has called for its abolition, on the grounds that the programme benefits wealthy foreign investors rather than providing tangible benefits for the wider Greek population. Other issues are related to due diligence processes, with critics cautioning that lack of proper vetting could leave the system open to abuse by politically exposed persons or persons of dubious financial background seeking to gain access to the European Union through real estate investment.

Of the various concerns raised, the programme's effect on the housing market has become especially prominent. A recent study by the Athens University of Economics and Business links demand generated by the Golden Visa programme with rising property prices and falling housing affordability, particularly in Athens, Thessaloniki and popular island destinations (Krinis, 2025). The findings have bolstered the claims that the scheme encourages the development of luxury real estate and the expansion of short-term rental accommodation, further burdening local communities. Consequently, the Golden Visa programme is more and more represented as a cause of urban displacement and growing social inequalities.

To summarize, the legal and administrative developments discussed in this section point to a gradual departure from the post financial crisis stabilization in Greece toward a more selective and strategic management of labor migration policy, which entails measures that are gradually more and more in line with the demands of the labor market, economic competitiveness and differentiated migration routes. Equally, the growing political controversy surrounding the Golden Visa scheme points out that migration governance is now deeply intertwined with broader conversations around housing affordability, social inequality and transparency.

Asylum, Securitisation and Border Politics

If labour migration is the area in which Greece's migration governance has become more pragmatic and economically-oriented, asylum governance is the field where tensions between humanitarian obligations, state sovereignty, European integration and security concerns are most visible. A comparative analysis of developments between 2023 and 2025 shows that there have been not only fluctuations in asylum applications or arrival figures, but a deeper transformation in the philosophy underpinning migration governance. This period saw a major change in Greece's asylum and refugee policy framework, with procedural streamlining combined with a clear move towards enforcement-oriented migration management. Developments took place in a context of persistent scrutiny of border practices and return operations, even as authorities focused on efficiency and alignment with EU standards.

During the period of reference, reform efforts were initially focused on improving the institutional functioning of the asylum system, by determining the number of Independent Appeals Panels operating within the Appeals Authority of the Ministry of Migration and Asylum, with the stated aim of reducing backlogs and accelerating the examination of appeals, which were presented as reinforcing procedural efficiency and strengthening compliance with EU asylum standards (Government of Greece, 2024e). However, these institutional changes also took place against a backdrop of ongoing concerns over informal returns and border enforcement practices. According to the Second Annual Report of the National Commission for Human Rights' Recording Mechanism of Informal and Forced Returns, issued in June 2024, covering incidents recorded in 2023, 45 cases were documented involving 1,438 individuals, including women and children. The report outlined coordinated actions and systemic patterns, and called for enhanced transparency, accountability and compliance with fundamental rights obligations (GNCHR, 2024).

Crucially, in March 2023, Frontex and the Greek authorities agreed to increase operational cooperation on returns, an initiative presented as strengthening implementation of EU return procedures (Frontex, 2023). At the same time, international bodies had voiced serious concerns about the practices of pushbacks. In 2022, the United Nations Special Rapporteur on the Human Rights of Migrants characterized pushbacks as a "de facto general policy" (AIDA, 2023) and the European Court of Human Rights ruled that Greece had not fulfilled its obligation to protect life and to conduct an effective investigation in a fatal maritime incident involving asylum seekers (Cossé, 2022). The Pylos shipwreck in June 2023 that killed hundreds of migrants heightened the urgency of calls for accountability and oversight. These developments set the broader

context within which the subsequent legislative reforms occurred (Yeager-Malkin, 2022).

By 2025, securitisation had clearly become a defining feature of migration and asylum governance. The change was conclusively clarified in July 2025, with the adoption of Article 79 of Law 5218/2025, which temporarily suspended access to asylum procedures for persons arriving from Northern Africa, mainly on the islands of Crete and Gavdos. The measure allowed asylum registration to be suspended for three months and made it possible to deport people without a case-by-case review. Asylum seekers were transferred to Pre-Removal Detention Centres without access to reception conditions, legal assistance or vulnerability screening. The decision triggered strong reactions from civil society organizations, legal experts, UNHCR and the Council of Europe, warning of the risks of potential refoulement and of incompatibility with EU and international protection obligations. The suspension was a clear move towards emergency-driven governance based on deterrence. One particularly important development was the temporary suspension of access to asylum procedures for certain categories of arrivals. Although justified as a reaction to exceptional circumstances, the measure posed fundamental questions of compliance with international refugee law and procedural safeguards. At a theoretical level, such developments are akin to what Agamben (2005) calls the state of exception, where extraordinary measures are normalised within the practice of governance. Restrictive asylum measures were first introduced as temporary measures in response to crises, but are increasingly embedded in normal administrative settings.

The securitisation of asylum cannot be understood in this light independently from the broader European context. Since the refugee emergency, the European Union has slowly moved towards externalisation strategies. The EU-Turkey Statement was one of the first and most influential examples of migration externalisation. Initially presented as an emergency response, it altered the migration governance in the Eastern Mediterranean fundamentally. Greece was becoming more and more a space of containment than a space of transit. These developments observed between 2023 and 2025 demonstrate the continuing influence of this logic. Border governance became increasingly incorporated within European migration management strategies. Cooperation with Frontex grew, surveillance capabilities were enhanced, and attention was directed at preventing irregular arrivals before they could access asylum procedures. This process reflects the Europeanisation of migration control, but this Europeanisation is still asymmetrical as proportional responsibility for reception and border management is not shared equitably, with frontline states such as Greece continuing to bear

disproportionate responsibility. Therefore, national governments are pressured by both European institutions and domestic constituencies.

On the Greek front, a more robust enforcement track was further enhanced with the implementation of Law 5226/2025 that redefined the Greek return framework in line with Directive 2008/115/EC (Government of Greece, 2025). The law combines the decision to return with the refusal of asylum and residence permits, clarifies the recognition of residence permits issued by other EU Member States and provides for a structured system of voluntary departure. The standard period of departure is seven to 14 days but in some cases the period can be extended and authorities may require monitoring to ensure the individual does not abscond. The law also criminalizes third-country nationals who remain in Greece after a final rejection of an asylum or residence claim and do not choose voluntary return, with the penalty being imprisonment for two to five years. This much-discussed provision indicates a move towards deterrence-based enforcement and poses questions about proportionality and the protection of fundamental rights.

Readmission and return have been the topic of intense discussion among civil society actors and legal scholars around the Minister of Migration and Asylum's Law 5226/2025. The law brings the return procedures for non-EU citizens into line with EU Directive 2008/115/EC, introduces stricter rules on removal and entry bans, harsher penalties for illegal entry, exit and stay, and amends rules on voluntary departure, unaccompanied minors and emergency situations. But safeguards in return procedures for UAMs Article 11 of Law 5226/2025 clarified the safeguards in return procedures for UAMs. The provision requires that a best-interests assessment is undertaken before any return decision is taken and that appropriate reception arrangements are in place in the country of return. The law incorporates child-specific safeguards into the general return framework by integrating national practice with Article 10 of Directive 2008/115/EC.

The law also modifies significant sections of the Migration Code concerning residence permits, the status and rights of beneficiaries of international protection. The government says the reform will improve administrative efficiency and increase compliance with EU standards, but critics say some provisions could weaken procedural safeguards, especially for vulnerable groups. Human rights groups have expressed concern at the adequacy of guarantees, the proportionality of enforcement and the possible adverse impact on asylum seekers and undocumented migrants. As implementation unfolds, the law's legal coherence, humanitarian implications and operational feasibility continue to be debated.

To summarize, the developments in 2023 – 2025 reveal a double, yet tense trend in Greece's asylum governance. On one hand, procedural

mechanisms have been fine-tuned and institutional capacity has been strengthened, and on the other, legislative reforms have prioritised return enforcement and deterrence. Asylum governance became more deeply embedded in wider discussions about security, sovereignty and border control. Asylum had ceased to be merely a matter of humanitarian responsibility, but increasingly became a tool to regulate and manage migration flows. This change is an example of what Boswell (2007) calls the change of migration governance from social policy to security policy, as migration becomes more and more linked to concerns about the exercise of state authority, territorial control and public order. This leads to a gradual change in policy priorities from the facilitating of protection to the control of mobility. The Greek experience shows that the governance of asylum is not considered, first and foremost, a protection regime. Instead, it increasingly serves as a means to control and limit access to territory and rights.

Integration, Citizenship and the Rise of a Post-Migrant Society

Public debates on migration have been dominated by the question of asylum governance and border management, but a different, less visible transformation has been taking place in Greek society. Beyond the headlines about irregular arrivals, asylum applications and border security, the period 2023 – 2025 shows the consolidation of a long-term process of migrant settlement and incorporation. This development is especially evident in the fields of citizenship acquisition, participation in the labour market, educational achievement, and the growing presence of second-generation migrants.

Undoubtedly, one of the most significant long-term trends in the history of Greek migration after 1990 concerns the gradual change in the status of migrant populations from temporary workers to permanent residents. In the 1990s, after the collapse of socialism, the migration flows that emerged were at first seen as temporary. Migrants, especially those coming from Albania, Bulgaria and other Balkan countries, were often seen as a flexible labour force that could be used to meet particular economic needs. Legal structures that focus more on short-term residence permits, employment authorisation and regularisation programmes than on long-term integration. Thirty years later, the situation has fundamentally changed.

The new Immigration Code (Law 5038/2023) is the most significant reform of the Greek legal migration framework in recent years, indicating an effort to modernise migration governance and further align national legislation with the evolving EU migration acquis, in particular Directive

(EU) 2021/1883 (Ministry of Migration and Asylum, 2023). One of its major provisions was the reform of the residence permit system, which enabled third-country nationals legally residing here to change categories of permits. It also enhanced the legal status of the second generation of migrants by extending the period of residence permits to ten years and broadening the scope of eligibility for young adults who had completed their education in Greece.

Further, the regime of residence permits for exceptional reasons was amended as regards parents of minor Greek citizens. The reform removed the earlier requirement of seven years of continuous residence and created a one-time, three-year permit with access to the labour market, based on no other proof than a parental relationship. On expiry, the beneficiaries can ask for a change of category of their residence permit, which stops the implementation of any return decision until a final decision is taken. This legislative change was preceded by a period of increased public debate, after an initial proposal from the Minister of Migration and Asylum to completely abolish this category of residence permit. The proposal raised serious concern among civil society organisations, legal practitioners and affected communities, as it threatened to leave parents of Greek minor children without a viable route to regularization. In reaction to these responses, the proposal was eventually withdrawn in the parliamentary process, and the residence permit category was maintained, with some limited changes.

These reforms also aimed at improving the protection of vulnerable groups, in particular unaccompanied minors. The emphasis is now on the consolidation of institutional protection mechanisms for unaccompanied minors (UAMs). For this purpose, the General Secretariat for Vulnerable Persons and Institutional Protection was set up (Presidential Decree 77/2023) (Ministry of Migration and Asylum, 2023b). The Secretariat implements the National Strategy for the protection of UAMs and other vulnerable third-country nationals and stateless persons, manages accommodation placements and coordinates referrals to appropriate housing schemes (Government of Greece, 2024f). Regulatory refinement was enhanced through the creation of standardized operating rules for supervised apartments, which promote semi-autonomous living for older UAMs. These measures aim to improve regulatory oversight through specific requirements on infrastructure, staffing, service delivery and monitoring, as well as increas access to education, health care and psychosocial support.

The significance of these developments suggests a broader change in Greek society from a country that has traditionally seen migration as a temporary phenomenon, to one defined more and more by permanent ethnic, cultural and social diversity. There is evidence that Greece is gradually becoming a so-called ‘post-migrant society’, where the

main problem is no longer migration per se but the social, political and institutional consequences of long-term settlement (Foroutan, 2019). However, the transition is still incomplete and contested, with integration policies still facing important limitations, while public debates often remain focused on border management and irregular migration.

Labour Market Integration and Economic Participation

The labour market is still one of the main fields in which integration takes place. Migrants consistently have relatively high labour market participation in 2023 – 2025. They remain crucial in sectors facing significant labour shortages such as agriculture, tourism, construction, hospitality, logistics, and care services. The unemployment rates of migrants declined during the reporting period, reaching historic lows in 2025. This is a sign of a wider economic recovery as well as a growing demand for migrant labour.

But labour market participation does not automatically mean full economic integration. Migrant workers are over-represented in some sectors of employment that have lower wages, more precarious working conditions and fewer opportunities for upward mobility. The Greek migration experience is still characterized by labour market segmentation. Certain sectors still rely heavily on migrant labour, while migrants are underrepresented in positions associated with higher status, greater security, and stronger institutional influence. This pattern is very similar to observations made on Southern European migration systems in general (Baldwin-Edwards, 2004; King, 2000). Migrants are incorporated into labour markets but often via occupational niches of structural vulnerability.

Recent policy reforms reflect an increasing awareness of these realities. The broadening of legal migration channels, the digitalisation of recruitment processes and the implementation of regularisation measures all point to attempts to tune migration governance to labour market needs. But these reforms also exemplify a broader change in the philosophy of integration. Integration is more and more defined not as a multidimensional social process but as a function of economic participation. The right to residence, protection and social inclusion becomes more and more conditional on employment and contribution to the labour market. This is a reflection of the broader trends in Europe where the policies of integration are increasingly aimed at self-sufficiency, employability and economic productivity.

Law 5226/2025 also dealt with the measures of integration for beneficiaries of international protection. Article 31 provided for procedural safeguards in the renewal of residence permits to ensure legal certainty in the renewal procedure. Recognised refugees are granted residence permits for three years, whereas those benefiting from subsidiary

protection are given renewable permits for one year. In October 2025, a major policy-level shift was marked by the presentation of the draft 'New Legal Migration Framework'. It creates a requirement for asylum beneficiaries to look for work so that they can retain access to certain integration support measures, indicating an increasing link between protection status and labour market participation. The draft further formalizes the role of Temporary Employment Agencies in recruitment processes and establishes streamlined legal migration channels according to labour market needs (Michailidis, 2025).

Integration policy has tended to remain lower on policy agendas, despite the considerable progress that has been made. The reception and security issues have often received priority over long-term inclusion, in terms of money, administrative focus and politics. But many of them, such as language programmes, labour market support mechanisms, educational interventions and housing assistance schemes, are fragmented, project-based or reliant on European funding. This challenge is also reflected in the gradual phasing out of some integration programmes in the course of 2025. The latest policy is characterized by the abolition of the housing subsidy HELIOS+ for recognized refugees, deep cuts in financial support for asylum seekers, and a policy of non-acceptance of asylum applications from North African countries. The public debate on the impact of refugee accommodation on the housing crisis in Athens has been criticized for perpetuating stigmatizing narratives and raising concerns about social cohesion and respect for fundamental rights.

All these developments point to two trends in integration policy. There has been continued institutional consolidation and regulatory standardization in the protection of UAMs and vulnerable groups on one hand. But in contrast, integration policy is increasingly expressed through the prism of economic participation, which signals a slow re-orientation towards conditional, labour-market-based inclusion.

Differential Integration and the Ukrainians

The arrival of displaced persons from Ukraine added an important new dimension to Greek integration policies. Unlike previous refugee populations, Ukrainians had the right to the Temporary Protection Directive, which granted them instant access to residence, employment, healthcare and education. More than 30,000 temporary protection permits had been issued by 2024 and the protection regime remained in force throughout 2025. The Ukrainian experience shows great variance in the governance of displacement. Ukrainian nationals have enjoyed immediate legal recognition and access to services, while asylum seekers from Syria, Afghanistan, Somalia, and other conflict zones often face lengthy asylum procedures and much uncertainty.

These differences are indicative of what migration scholars have called “differential inclusion” (Gemi, 2019). Migration trajectories are not the same for all migrants. Access to rights, protection and opportunities is often determined by legal status, nationality, geopolitical considerations, and public perceptions. The Ukrainian case, therefore, offers important insights into contemporary migration governance, especially the increasingly selective character of contemporary migration regimes.

Legally, temporary protection for displaced persons from Ukraine in Greece continues to be implemented in accordance with Council Implementing Decision (EU) 2022/382 and the relevant national framework (Ministry of Migration and Asylum, 2022a). The key developments concern successive extensions of protection status and adaptations of integration measures (Ministry of Migration and Asylum, 2022b). In February 2024, the Ministry of Migration and Asylum issued a Ministerial Decision to extend temporary protection until 4 March 2025. In January 2025, a further extension of the regime was decided until 4 March 2026. Therefore, all residence permits for temporary protection that expired in March 2023, September 2023, March 2024 or March 2025 were automatically extended until March 2026, without any additional action required by the beneficiaries. The status remains to offer legal residence, access to the labour market, healthcare and social services in accordance with the Migration Code. In practice, many Ukrainian families have found homes in Attica and Thessaloniki, assisted by EU-funded accommodation schemes and NGO networks. Some 15,000 Ukrainian children are enrolled in Greek schools that are benefiting from language and psychosocial support programmes.

During this time, a particular legislative provision (Article 55) was introduced which permits ethnic Greeks with Ukrainian citizenship who arrived after 24 February 2022 to submit an application for Greek citizenship via a simplified process, provided they possess a valid temporary protection residence permit. They have the right to work but integration into the labour market is difficult. Surveys show that unemployment among Ukrainian refugees remains high, especially among women, primarily due to language barriers and difficulty getting their qualifications recognized. While targeted employment and vocational initiatives have increased, structural barriers remain (Centre for Innovation and Culture, 2025).

Citizenship

The most obvious sign of this larger transformation might be the acquisition of citizenship. Naturalisation figures in the reports show a steady increase throughout the reporting period. Around 13,875 foreigners were granted Greek citizenship in 2023, continuing the upward trend

of previous years. By 2024, that number had climbed to almost 15,000 acquisitions. It is the makeup of those becoming citizens that matters more than the absolute numbers. The largest group of new citizens in the reporting period was second-generation migrants. In both 2023 and 2024, around half of all naturalisations were people getting citizenship under second-generation provisions.

This pattern has deep implications because citizenship in Greece was historically tied to ethnic descent under the *ius sanguinis* principle. The proliferation of second-generation citizens indicates a slow but sure change toward more inclusive understandings of political membership. Citizenship legislation continues to be shaped by powerful ideas of national continuity, but the growing integration of second-generation migrants suggests that social realities are blurring the traditional boundaries of belonging. From a sociological point of view, citizenship serves a number of functions. It is a symbolic recognition of the people as members of the national community, not just the granting of legal rights. It allows for political participation, it supports mobility in the labour market and it encourages social inclusion. However, it must be recognised that the acquisition of citizenship and formal membership does not automatically lead to the elimination of inequalities, discrimination or social exclusion. While it creates opportunities for participation, it also exposes continuing challenges regarding representation, identity and social recognition.

The Greek government approved several decisions regulating the naturalisation of foreign nationals, defining requirements, examination procedures and institutional adjustments. An important part of this framework is Decision No. 192/2023 laying down the examination procedure for the Certificate of Adequacy of Knowledge for Naturalisation (PEGP). As a prerequisite, the certificate assesses applicants' legal residency, Greek language skills and level of social integration, establishing a uniform standard of assessment for naturalisation. In addition to the examination system, legislative amendments have sought out particular routes to citizenship. The amendment to Article 26(1) of the Greek Citizenship Code (Law 3284/2004) through Article 56 of Law 5143/2024 clarifies the procedure for formal recognition of Greek citizenship in cases where the parents acquired Greek nationality by birth after the birth of the child. The provision applies to children born within marriage or civil partnership, and to children born out of wedlock to a mother who later became a Greek citizen.

Finally, Article 95 of Law 5225/2025 amends the naturalisation regime for minors and young adults, simplifying procedures and clarifying eligibility conditions. It enables foreign minors who have completed nine years of schooling in Greece, or six years of secondary education, to obtain citizenship through declaration and application. Graduates

of Greek universities with a Greek secondary diploma can apply for citizenship within three years of graduation. The law also allows for the acquisition of citizenship by minor children of newly naturalised parents.

In conclusion, migrants arriving in the 1990s and early 2000s have become more or less permanent settlers. Many have started families, bought homes, become part of local communities, and made lasting social and economic ties. Their children have gone to Greek schools, Greek universities and in ever increasing numbers have entered into professional occupations. The 2023 – 2025 reports' evidence backs this transition. The increase in the number of citizenship acquisitions and the growing share of second-generation beneficiaries indicate that migration cannot be seen any longer mainly as a temporary phenomenon. For a large number of migrants, migration has become settlement. One of the most important social changes occurring in contemporary Greece is the growing visibility of these populations.

Towards a Post-Migrant Society?

The developments observed between 2023 and 2025 indicate that Greece is slowly entering a new phase in its migration history. The central questions are no longer only about arrivals, borders or asylum applications. They increasingly deal with coexistence, participation, citizenship, representation, and social transformation. This transition reflects the emergence of Foroutan's (2019) post-migrant societies. There is no shortage of migration in such societies. Rather, they are societies in which migration has become a constituent element of social reality. Migrant descendants become citizens, diversity becomes normalised, and social institutions slowly adapt to more and more heterogeneous populations.

The Greek case exemplifies many of the features of this transition. The emergence of second-generation citizens, the permanence of migrant communities, the diversification of labour markets and the growing visibility of multicultural realities all point to the emergence of a more plural social landscape. But the transition is not yet complete. Public discourse still treats migration as an external problem rather than as an internal social reality. Political debates continue to focus on irregular arrivals and border security. Integration policies lead to more social change. Irregular arrivals and border security continue to dominate the political debate. The integration policies tend to follow social transformations.

Thus, present-day Greece is located in an intermediate position between two migration paradigms. It remains a front-line state with significant migration pressures, but it is also evolving into a mature immigration society with long-term settlement and growing diversity. The confluence of these realities is one of the hallmarks of contemporary

migration governance. Migration involves questions of borders and belonging, of control and participation, of mobility and settlement. Grasping this duality is crucial to comprehending not just migration in Greece, but the wider transformations reshaping European societies in the twenty-first century.

Conclusion

Greece's migration evolution in 2023 – 2025 reveals more on the changing migration flows, asylum applications and policy reforms. It offers a lens through which to view the broader transformations occurring in Greek society, the Balkans and Europe. Migration has indeed become a prism through which economic restructuring, demographic decline, political contestation, state transformation and European integration are refracted simultaneously.

In this chapter I have argued that contemporary migration in Greece can be best understood as a palimpsest where successive historical layers continue to coexist and interact within the present. Post-socialist labour migration, the 2015 – 2016 refugee emergency, the economic crisis, demographic ageing, European integration and contemporary border politics should thus be seen not as separate episodes but as interconnected processes that co-influence the evolution of migration governance in Greece.

Between 2023 and 2025, developments point to Greece entering a new phase in the evolution of its migration system. The current phase is not only about turning Greece into a country of immigration as in the 1990s and 2000s, but about the reconfiguration of migration governance itself. This change does not mean a break with past times but rather the adjustment of established governance structures to new demographic pressures, labour market needs and changing European migration policies. This reconfiguration is manifest in three closely interwoven developments.

First, migration has become more important for Greece's demographic and economic development. The long-term population decline, the ageing of the population and the increasing shortages of labour have gradually moved migration from the periphery of public policy to the core of debates on economic sustainability. Although concerns around irregular migration, border security and social cohesion continue to be prominent in political discourse, migration is increasingly discussed in terms of a strategic resource to sustain the labour market and address demographic decline. This juxtaposition of these competing policy imperatives sheds light on the slow evolution of migration governance

from a largely security-oriented paradigm to one that incorporates demographic and economic aims.

Second, the period 2023 – 2025 is characterized by the increasing differentiation of migration governance. Greece has not followed a simple inclusion-exclusion path, but has instead created a more selective migration regime, where rights, legal pathways and opportunities are differentiated based on migrants' legal status and their perceived economic value. The expansion of legal channels and facilitated residence or integration measures have benefited labour migrants, investors, second-generation migrants and beneficiaries of temporary protection. At the same time, asylum seekers and irregular migrants have faced more stringent border controls, more restrictive asylum procedures and increased return policies. This differentiated approach reflects broader developments in Europe, where migration governance increasingly differentiates between desirable and undesirable forms of mobility, producing unequal access to rights, protection, and long-term inclusion.

Third, it indicates the ongoing securitisation of migration governance. While Greece has strengthened its asylum and migration institutions since the refugee crisis of 2015 – 2016, migration governance has become increasingly embedded within wider frameworks of border security and migration control. Comparative evidence points to a gradual shift from reception- and protection-oriented approaches to deterrence, as border surveillance, return policies, recurrent allegations of pushbacks, and access restrictions are gaining centrality in migration governance. This trajectory mirrors a wider European trend to align humanitarian commitments with an enhanced focus on external border management, with deterrence and the externalisation of migration control.

Ultimately, the Greek experience, seen through the prism of the Balkan palimpsest, shows that migration governance develops not through successive ruptures but through the accumulation and interaction of historical layers. Contemporary migration is thus the product of the long-term impact of past migratory experiences and the adaptation of governance to new demographic, economic and geopolitical realities. This provides broader insights into the transformation of migration regimes across Southern Europe.

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BULGARIA

From Emigration to Immigration: The Case of Bulgaria

Daniela Bobeva & Atanas Pavlov

Introduction

Over the past three decades Bulgaria has gone through one of the most complete migration transitions observed in Southeast Europe. The country entered the 1990s as one of the region's largest sources of emigration, losing close to one million inhabitants to successive outward waves, and has recorded a consistently positive net migration balance since 2020. This chapter traces that transformation. Working from data on inflows and outflows, it identifies the combination of factors that turned Bulgarian migration into an increasingly immigration-driven pattern.

The analysis gives particular weight to cross-border migration with the Balkan countries, both historically and in recent decades. Ethnic ties and geographic proximity have shaped Bulgarian migration in a lasting way, and neighbouring states have served at different times as destinations, sources and transit spaces. To capture this range, the chapter takes a broad analytical approach that covers long-term and short-term mobility, labour migration, the migration of highly skilled workers, naturalisation and citizenship acquisition, refugees and asylum seekers, transit migration, and education-related migration.

The chapter draws on official Bulgarian administrative and statistical sources, including the National Statistical Institute (NSI), the National Employment Agency, the State Agency for Refugees, the Office of the President, and the Ministry of Interior, alongside harmonised international data from Eurostat and the OECD Continuous Reporting System on Migration (SOPEMI). Where the two types of source diverge, the chapter notes the discrepancy, since the gap between administrative figures and residence-based data is itself informative about the character of Bulgarian

migration. The empirical basis follows and builds on the country's most recent SOPEMI report (Bobeva, 2025).

The chapter first traces the historical evolution of Bulgarian international migration and its close connection to movement to and from neighbouring Balkan states. It then examines the turn to immigration after 2020 and its main drivers, before analysing the channels through which cross-border migration with the Balkans is most visible today: forced migration and refugees, labour migration, naturalisation and citizenship, and foreign students. The concluding section draws these findings together and considers their implications for a regional labour market.

History of Bulgarian Migration

The unique history of Bulgaria's migration stimulated an extensive academic literature, yet research did not anticipate the sharp reversal of the migration balance in recent years. Bulgaria's turn to immigration, examined below, turns out to be two separate processes running at once rather than a single trend: Bulgarians coming home, and foreign nationals settling in growing numbers. The two respond to different pressures and affect the labour market and the population's long-run structure in different ways. The chapter treats them separately and asks, in each case, how far the reversal is likely to last.

Bulgaria's first major migration event of the modern era was also one of the largest forced population movements in postwar Europe. Between 1989 and 1993, driven by the policy to force ethnic Turks to adopt Bulgarian names, some 300,000 people left Bulgaria for Türkiye (Bobeva, 2025). The origin of the movement was mainly political rather than economic while its dramatic demographic and economic negative effects remain in the whole history of Bulgaria. It affected every age and educational group, originated predominantly from rural areas, and left a lasting mark on agriculture and the ethnic composition of the population.

A second large migration outflow emerged after the opening of the borders for the travel of Bulgarians abroad. Unlike the first one, this wave`s origin was largely economic as it was directed mainly toward Greece and Western Europe. Census data show an emigration loss of about 177 thousand citizens during the period against only around 19 thousand returns (NSI, 2022; Bobeva, 2025). Around 40% of this outflow, excluding seasonal workers, was directed to Greece. This outflow was also characterised by a severe brain-drain (Bobeva, 1993).

This movement also differed from the first wave in terms of origin. It came mainly from urban areas and small and medium-sized towns, which began to depopulate as a result. Most migrants were women with higher education, who often took low-skilled jobs abroad. The share

of young migrants, mainly students and young professionals, grew steadily. The period brought rising remittances, more mixed marriages and bilateral employment agreements. The prospect of EU membership eased emigration, producing temporary, return and circular migration alongside permanent settlement and a stronger cultural and academic exchange.

Bulgaria's accession to the European Union on 1 January 2007 confirmed the model where economic factors outweigh the regulatory restrictions imposed by the recipient countries. The gradual lifting of transitional restrictions on Bulgarian workers in other EU member states made little difference to the underlying dynamics as the gaps in payment, education and living standards continued to drive further population loss through emigration. Immigration remained marginal and different in kind – a modest inflow of EU citizens, drawn mainly by property and holiday homes, combined with migration linked to foreign direct investment. Through this period, the regional, Balkan character of Bulgarian immigration still dominated since inflows were led by citizens of countries with Bulgarian minorities.

Within these successive waves, international migration has become the main driver of demographic decline in Bulgaria. Census data show persistent net losses that reflect structural rather than cyclical demographic effects. Cumulative net migration recorded between successive censuses accounts for a large share of the total population decline, peaking in the inter-census period from 2011 to 2021, when the population decreased by 884,778 people, and net migration accounted for 344,000 of this decline (NSI, 2022).

Since 1992, the cumulative inter-census net migration deficit has reached 1.06 million, including a net loss of 158,000 (177,000 emigrants versus 19,000 returnees) to Greece and Western Europe in 1995 to 2001. This followed the departure of around 300,000 people to Türkiye in 1989 to 1993. The benefits of this emigration for the sending economy were negligible, and its scale and persistence point to a structural effect on long-run labour supply and on the trajectory of regional development. This pattern held until the COVID-19 pandemic, after which, as the following sections show, it changed fundamentally.

From Emigration to Immigration

Over the past decade, international migration in Bulgaria has changed driven by the interaction of pull and push factors. The immigration started increasing similarly to the past emigration in waves but those waves were driven mainly by external factors. The first wave of migrants was a result of the war in Syria and the second one by the war in Ukraine. In parallel,

Bulgaria became a more attractive destination for migrants due to the increasing wages and favourable labour market.

The country has become a destination for a mixed inflow of international migrants as well as for the returning Bulgarian citizens. Rapid income growth during the decade, combined with relatively generous social policies and low unemployment, encouraged both return and inward migration. The deteriorating economic conditions in traditional destination countries encouraged Bulgarian emigrants back into the very high-demand labor market.

2020 marks a turning point in Bulgaria's fiscal and income policies. From that point on, a set of mutually reinforcing pull factors changed the balance of costs and benefits behind migration decisions, leading to a lasting shift towards immigration and return. The labour market tightened with unemployment close to 4% and high labour demand. Wage growth outpaced both inflation and productivity, while the real convergence accelerated with the preparation and joining the euro area (Bobeva, 2025).

The positive net migration balance recorded since 2020 is contributed mainly by two groups. The first is the return of Bulgarian citizens, drawn home by rising domestic wages and by worsening conditions in some destination countries. The second is the growing settlement of foreign citizens. This group includes refugees and temporary protected migrants who increasingly settled rather than move on to Western Europe. There is also a large and expanding group of labour migrants recruited from an ever-wider set of origin countries. This engine adds not only to the labour market but also to the population increase. Third-country nationals have been the largest and steadiest contributor to the net migration inflow since 2020 and returning Bulgarian migrants the second-largest component of the inflow while migrants from EU countries constitute small and unstable immigrant group. The three components of the inflow, Bulgarian citizens, EU citizens and third-country nationals, show different patterns, but the overall trend is one of gradual growth (Figure 1). Free movement within the EU has not on its own produced a substantial immigration flow from other member states.

The combination of large inflows and shrinking outflows has produced a positive total net migration balance of 39,187 in 2024 and 35,085 in 2025, a sixth consecutive year of net immigration after three decades of losses. All three groups, Bulgarian citizens, EU citizens and third-country nationals, recorded a positive net balance throughout the period. For the first time in thirty years, Bulgaria has recorded a positive net migration balance for its own citizens in four consecutive years (a net gain of 9,086 Bulgarian citizens in 2024 and 12,837 in 2025), reflecting both falling emigration and sustained return.

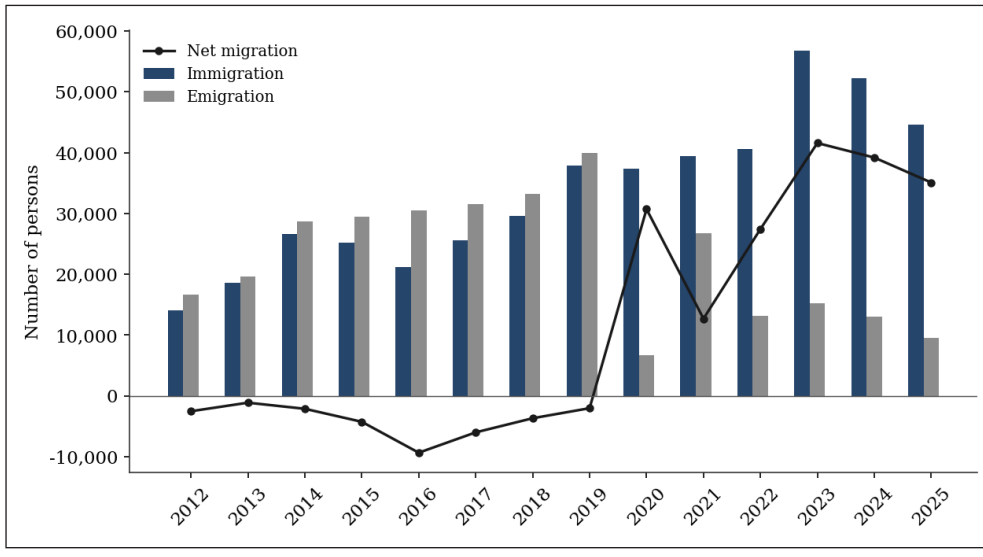


Figure 1. Immigration, emigration and net migration, Bulgaria, 2012 to 2025

Source: *Authors' calculations based on NSI data (2025b).*

Emigration, by contrast, has fallen to historically low levels. Bulgarian emigration is highly volatile and sensitive to shocks at home and abroad. In the pandemic year of 2020, it nearly stopped, reaching what was then a record low of 6,649. It has broadly fallen since 2021, with the outflow dropping to 13,002 in 2024 and to 9,555 in 2025, the lowest level outside the pandemic year of 2020; Bulgarian citizens made up just 4,532 of the 2025 outflow. Bulgarian citizens have traditionally made up most of the outflow, exceeding 90% of the total in some years. Its recent contraction, together with the fact that in 2025 foreign citizens for the first time came close to matching the Bulgarian share of the outflow, marks a qualitative shift. As incomes rise and the population ages, emigration is not expected to return to the levels of a decade ago, and the sources and motives for mass emigration appear increasingly exhausted.

Growing Return Migration: Who is Returning?

Return migration has become a structural feature of the past decade. It peaked in the pandemic year of 2020 at 24,007 returnees and, although it has slowed since then, remained substantial at 18,205 in 2024 and 17,369 in 2025 (NSI, 2025 b). The age profile of the inflow is unusually favourable. In both 2024 and 2025, about 72.9% of all immigrants were of working age (15 to 64), and close to one in six was a child under 15. Return migration both strengthens the labour force and eases the country's difficult demographic situation. Net migration is positive across

almost every age group of returnees, with a peak among young children aged 0 to 4. Net migration among Bulgarian citizens aged 20 to 24 stayed negative reflecting departures for study abroad.

The age profile answers the question of who is actually returning: mainly young families and people of working age rather than pensioners, a mix that strengthens the labour force rather than simply replacing it.

Two complementary forces explain why people return. The first is internal. The pull factors described above (wages, the labour market) make staying at home, or coming home, steadily more attractive in absolute terms. The second is external and specific to the destination country. The United Kingdom, historically one of the leading destinations for Bulgarian labour migration after Brexit became one of the largest sources of return migration.

A separate return channel runs through the pension system and points to an older group that is almost invisible in the annual migration flow data. Social security data show that the number of pensioners receiving Bulgarian pensions and supplements under EU regulations and international agreements, covering both those residing in Bulgaria and those residing abroad, increased from 50,162 at the end of 2020 to 75,188 at the end of 2024, an increase of 49.9% in four years (*National Social Security Institute, 2025*).

The share of those residing in Bulgaria increased from 72.6% to 78.5%, and their number in absolute terms from 36,433 to 59,007. A rapidly growing group of pensioners have chosen to live in Bulgaria instead of in the country where they acquired their pension rights. This is the dominant direction of the pension-related channel. The number of pensioners who remain abroad while receiving a Bulgarian pension also increased but to a lesser extent. This group is concentrated in Germany, Spain and Greece, the same countries that dominate the wider Bulgarian diaspora. The channel also carries a visible historical footnote.

Pensions paid under the bilateral agreement with Türkiye, the mechanism that served the descendants of the 1989 – 1993 emigration wave, covered 12,023 people at the end of 2023, a 4.5% decrease year-on-year, consistent with the gradual demise of this founding generation rather than some new outflow. Taken together, the pension data show that return migration is not limited to the working-age, family-forming cohort visible in the annual flow statistics. A smaller but rapidly growing flow of pensioners with pension rights acquired abroad is also settling in Bulgaria, a group whose return supports consumption and demographic stabilization, but unlike the return of working-age citizens, does not contribute directly to the labor supply.

Return migration occurs in the last years together with a significant increase in remittances, which reached a record €1.021 billion in 2024 (BNB, 2025) – a level difficult to explain by interest rate differentials and

most plausibly linked to the repatriation of savings by returning migrants. This migration related savings channeled to Bulgaria help improving current account position. There are evidences that booming real estate market is boosted by the remittances. Migrants expect that investment properties will bring additional income upon return.

In support of return migration, the government launched the “I Choose Bulgaria” program aiming at returning young Bulgarians. Approved participants receive assistance for moving household goods worth up to €5,000, labor market information and support for finding a job, financial support for housing, and Bulgarian language training for family members. From the sixth month after return, they can claim 30%, and from the twelfth month – 50% of six average salaries in the sector. The programme started in mid-2025 and for one year already 4142 applied and almost 2000 returned, mostly IT specialists, teachers, doctors, and engineers (National Employment Agency, 2025).

The Bulgarian diaspora remains one of the largest diasporas in Europe and Central Asia in terms of population. Its geography reaffirms the enduring Balkan dimension of Bulgarian mobility. The number of Bulgarian-born people living abroad in 2024 is around 1.25 million, with most of them in Europe (851,797), followed by Türkiye (348,052) and North America (20,592) according to UN estimates (UN DESA, 2024). The largest communities within the European Union are in Germany (338,439), Spain (103,587), Greece (78,992), Belgium (51,857), and Italy (50,769). The two historical Balkan destinations, Türkiye and Greece, still host over 425,000 Bulgarian-born residents, a living legacy of the emigration waves of 1989 to 1993 and 1995 to 2001, and a reminder that the country’s largest migration movements remain regional.

Returning workers and returning families contribute directly to the labour supply, while the pension-related cohort supports consumption, demand for housing financed by remittances, and the tax base without expanding the labour force. The historic decline in the number of pensioners under the agreement between Bulgaria and Türkiye is a reminder that not every return channel is growing: some are closing as the generations that created them age, even as new ones open in their place.

Return migration is a growing benefit for the economy boosting labour market and population growth as well as expanding the fiscal and financial inflows by remittances and pensions.

As the Bulgarian diaspora is large, this source of return could play a further role in reducing the negative consequences of past large emigration.

Gender and Migration

The gender composition of migration has changed in line with the broader transition. In the period of net emigration, women predominated in the outflow, reflecting the wave pattern from 1995 to 2001, and accounted for 54.5% of all emigrants by 2010. This predominance has since faded. In the recent years, flows are closer to balanced, with a slight male preponderance. In the period 2020 to 2025, women accounted for an average of 45.9% of immigration and 43.7% of emigration, with the male majority reflecting the predominantly male composition of labour migration from third countries. In 2025, the balance narrowed again, with women accounting for 47.4% of inflows. Most importantly, the turnaround since 2020 has not been gender-specific: both men and women have simultaneously moved from persistent net losses to significant net gains. Men account for a modest share of the net increase, a net increase of 18,484 compared to 16,601 for women in 2025, but the nearly parallel trends suggest that return and immigration have attracted men and women to roughly equal degrees, which is favorable for family formation and demographic stabilization.

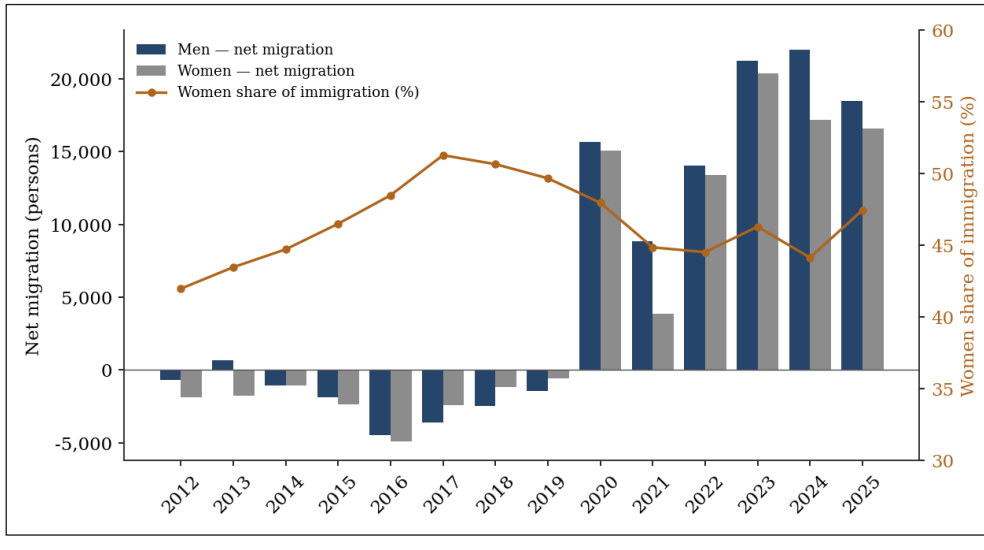


Figure 2. Net migration by sex and the female share of immigration, 2012 to 2025

Source: *authors' calculations based on NSI data (2025a).*

Refugees and forced migration

As an external border of the European Union, Bulgaria is heavily exposed to refugee pressure from its wider neighborhood, and forced migration has been a major factor reshaping the pattern of its migration.

The inflow of people seeking international protection is highly volatile and closely tied to political instability in nearby regions, and its contribution to the overall migration balance differs in kind from that of labour and return migration: it is driven initially by political rather than economic causes, and its scale is set abroad rather than by conditions inside Bulgaria. From just 276 applicants in 1993, the number reached a record 22,518 in 2023 (SAR, 2025) before falling by 45.6% to 12,250 in 2024 (Figure 3).

The steady increases linked to traditional source countries such as Afghanistan and Iraq have repeatedly been overtaken by very large groups arriving over short periods, most visibly in two distinct Syrian waves. The first coincided with the escalation of the Syrian civil war and the wider European migration crisis of 2014. The second, a sustained wave running from around 2023 to 2025, again saw Syrian nationals consistently dominate applications: about 62.8% of the 12,100 first-time applicants recorded in 2024 (OECD, 2025). Each wave placed severe strain on the institutional system.

What has changed between the two waves is not so much the scale of arrivals as what happens afterward. Bulgaria's role is increasingly that of a destination rather than a pure transit point. The number of registered departures of third-country nationals has fallen even as the resident third-country population has grown, a pattern the national report attributes directly to "a growing trend toward settlement" (Bobeva, 2025), reinforced by tighter border controls against onward movement. The same logic that governs the wider cycle of forced migration applies with particular force to Syrians. Political instability at home continues to drive entry, but

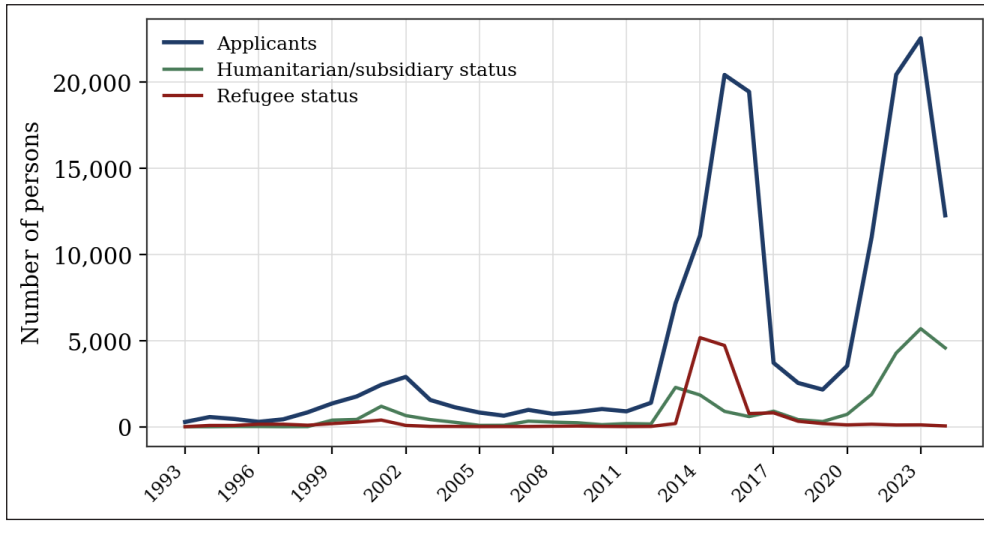


Figure 3. Applicants for international protection and status granted, 1993 to 2024

Source: *Authors' calculations based on State Agency for Refugees data (SAR, 2025).*

the reasons for staying are now mainly economic and social: access to the Bulgarian labour market, the narrowing of exit routes to the rest of the EU, and, for those granted status, the same wage and labour demand conditions that draw other migrants and returnees. In this respect, forced and labour migration converge for those who receive protection. Political causes explain arrival, while the economic pull factors described above increasingly explain why people stay.

Forced migration follows a wave-like pattern that is key to understanding its regional effects. Political factors trigger entry, while economic and social conditions largely determine how long people stay and how well they integrate, a shift from short-term to permanent residence. Even as waves recede, they leave lasting effects on every other migration channel, generating follow-on demand for citizenship, family reunification, labour market access and education. Restrictive procedures, unaccompanied minors and the transit role of the Balkan route are recurring features. The Balkans continue to serve as a key transit region in this respect: the most active entry point remains the Bulgaria-Türkiye border, while attempts at irregular exit concentrate on the Bulgaria-Serbia border, underlining the cross-border, regional character of the phenomenon.

Temporary protection for displaced Ukrainian citizens is a separate and significant episode. Since the war began, about 3.3 million Ukrainians have crossed the Bulgarian border. Of these, 225,471 have received temporary protection status and 89,400 remain in the country (SAR, 2026). The Ukrainian case is where the two dominant concerns of migration policy meet, protection and labour supply, since Ukrainian citizens have entered the local labour market with active support from both institutions and business.

Labour Migration

Labour migration is the channel where the shift toward immigration is most pronounced. Since the pandemic, the Bulgarian labour market has been marked by low unemployment and large shortages, creating sustained pressure from employers to open the market to foreign labour. An annual assessment of labour needs, carried out by the National Employment Agency among employers, gives a more concrete sense of scale and creates the sense of managed labour migration.

Legislative changes in 2021 introduced a single application procedure for the four categories of work permit for third-country workers, easing access. The 2024 to 2025 reforms continued this liberalisation: the maximum length of seasonal employment was extended from 90 to 180 days, EU Blue Card holders gained wider mobility rights, a “digital nomad” residence status was introduced.

One of the new developments in migration in Bulgaria is the sharp increase in the inflow of foreign labour. After decades of protecting the national labour market and restricting all kinds of foreign labour, the trend reversed in 2021. The liberalization concerns all forms of foreign labour. In 2024, 34,720 citizens of 80 third countries gained access to the Bulgarian labour market (National Employment Agency, 2025). The labour migration to Bulgaria occurs in different forms. The composition of the inflow by permit type is varied.

Bulgaria still fails to attract a sufficient number of highly skilled migrants through the EU Blue Card. Holders are concentrated in ICT, trade, the automotive sector, construction and manufacturing, and a large share use Bulgaria as a transit point before moving on to better-paid EU labour markets.

Intra-corporate transfers are also marginal in numbers and depend closely on foreign direct investment and large infrastructure projects (gas pipelines, roads, and prospectively new nuclear capacity).

The fastest growing inflow of foreign workers is that of seasonal labour. In the EU, Bulgaria is one of the countries with the fastest growth of foreign seasonal workers. Seasonal workers are concentrated in agriculture and tourism.

The residence permit data by reason (Figure 4) confirm a qualitative change. For the third-year running, the main driver of the third-country inflow is remunerated activity rather than family reasons. The shift shows

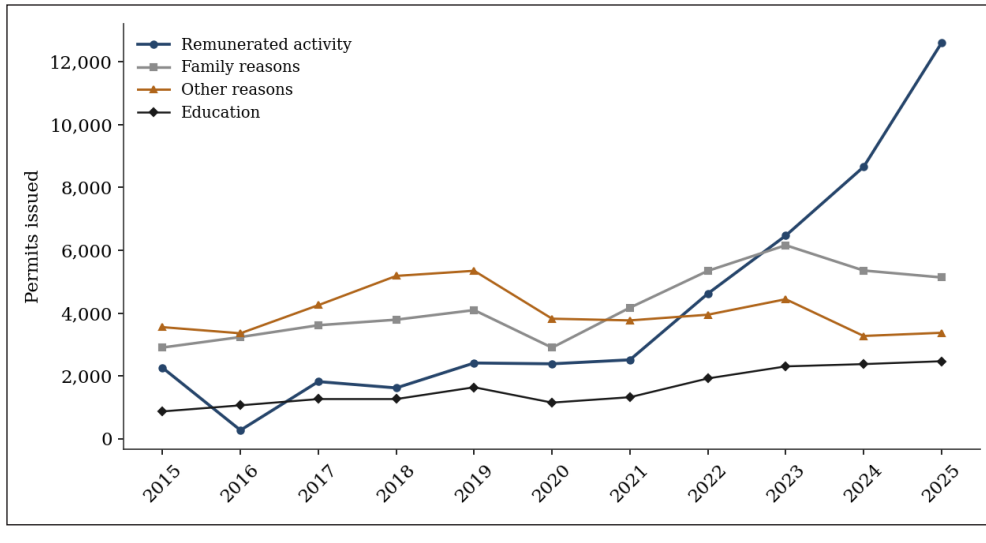


Figure 4. Residence permits granted to third-country nationals by main reason, 2015 to 2025

Source: *Authors' calculations based on NSI data (2025c).*

up in duration as well as volume: the share of remunerated-activity permits valid for twelve months or more reached 90.4% in 2025, against roughly a third in the mid-2010s. Together with the lengthening of family-related stays, this move from short-term to long-term permits confirms a shift from temporary residence toward longer-term settlement.

Family reunification nonetheless remains a substantial, if secondary, contributor, and one that grows automatically alongside every other channel: as labour migrants, refugees and long-term residents accumulate, each creates an entitlement for a family member to join them. Family reunification is best understood not as an independent driver of immigration but as a multiplier on the other three channels, labour, protection and long-term residence, which turns a growing first-generation stock into a growing second wave of dependants.

The countries of origin of foreign workers show a clear structural change. Workers from Türkiye dominated for many years, but recently more workers arrived from Central Asian countries, from Uzbekistan, Kyrgyzstan, as well as from India and Bangladesh (National Employment Agency, 2025). Labour migration to Bulgaria from the Balkan region is limited. The dominant trend is a steady lengthening of the distance from which foreign labour is drawn, a deregionalisation of labour migration that contrasts with the still strongly regional pattern of citizenship acquisition discussed below.

Despite broadly favourable public attitudes toward admitting foreign workers and clear, growing domestic demand, Bulgaria ranks among the most restrictive labour markets in the EU on Eurostat's managed migration indicators: its rate of first residence permits per thousand inhabitants is 3.05, the lowest in the EU (Eurostat, 2025). This paradox, high demand paired with restrictive practice and heavy administrative burden, is exactly where the potential for intra-Balkan labour mobility remains untapped taking into consideration the double-digit unemployment in many of the Balkan countries. Cross-border movement between these markets nonetheless stays limited, and much of the mobility that does occur takes the form of entrepreneurship and self-employment. The mismatch between regional unemployment and sectoral needs points to considerable room for targeted bilateral and regional mechanisms, and lends weight to the idea of a regional labour market comparable to the region's integrated energy market.

Naturalisation and Citizenship

If labour migration is becoming deregionalised, naturalisation remains the channel through which cross-border migration with the Balkans is most concentrated. Citizenship is acquired almost entirely

by citizens of neighbouring countries and states with Bulgarian minorities, and it represents the largest single inflow from the region to Bulgaria (Figure 5). The country is one of the largest issuers of citizenship in the Balkan region. Over the whole period since 1999, Bulgaria has granted citizenship to 222,131 people (Office of the President, 2025), roughly as many as are born in the country in five years.

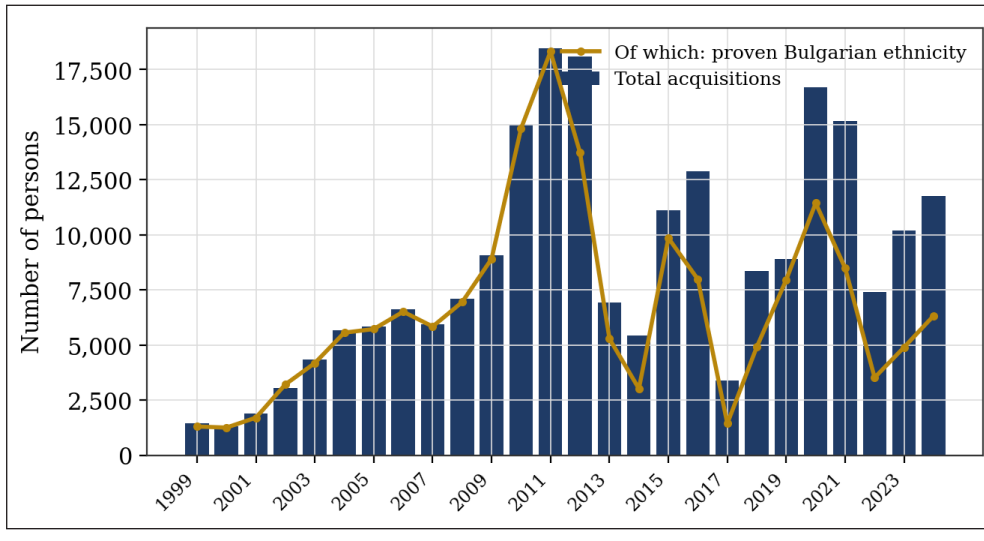


Figure 5. Acquisitions of Bulgarian citizenship, 1999 to 2024

Source: *Authors' calculations based on Office of the President data (2025).*

Obviously, Bulgaria is an attractive country for acquiring citizenship but also for restoring lost citizenship. In 2024, 4,490 people restored their Bulgarian citizenship, taking the five-year total to 12,753 and pointing to the country's growing appeal for its former citizens, a trend that, together with return migration, may help support population growth.

While the applications for citizenship increase, the increasing rejections point to the stringent criteria for the acquisition. The pace of citizenship acquisition depends more on the intentions of residents of neighbouring countries than on Bulgarian policy itself, which has remained consistent in favouring Bulgarian origin.

The regional make-up of new citizens has shifted noticeably. North Macedonia, the dominant source for many years, is no longer the main contributor (Figure 6). Over 2012 to 2025 60,236 citizens of that country received Bulgarian citizenship. But the source appears increasingly exhausted. Over the same period, 20,053 Albanian residents have received citizenship, Türkiye 12,357 and Serbia 9,011, confirming that acquisition is concentrated among Bulgarian minorities and kin populations in neighbouring states.

Ukrainians of Bulgarian origin easily receive citizenship and recently the war-driven aspirations of the Bulgarian minority in Ukraine led to an increase in the granted citizenship. One of the new developments, as far as the citizenship is concerned, is the growing number of Turkish citizens who acquired Bulgarian citizenship, partly through restored citizenship. Among non-bordering sources, the Bessarabian Bulgarian minority sustains a steady flow from Moldova.

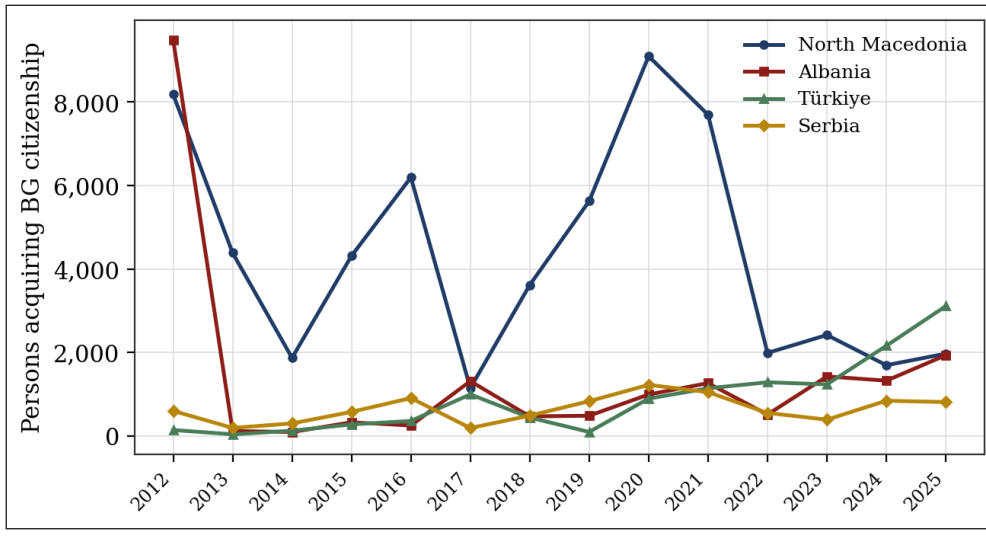


Figure 6. Acquisitions of Bulgarian citizenship by selected Balkan country of origin, 2012 to 2025

Source: *Authors' calculations based on Office of the President data (2025).*

One important qualification concerns where new citizens actually live. A substantial share of people granted Bulgarian citizenship do not reside in Bulgaria, even temporarily. The gap between the figures reported by the Office of the President, which cover all acquisitions, and Eurostat's residence-based data, which cover only people with a current address in the country, is large: in 2021, for example, 15,171 acquisitions in total correspond to just 2,183 people with a registered Bulgarian address (Eurostat, 2025).

Much of the region's citizenship acquisition therefore acts as a gateway to onward mobility within the EU rather than to settlement in Bulgaria, a distinction that matters when assessing this channel's demographic contribution.

Foreign Students

Bulgarian policy consistently prioritises the education of young people from Bulgarian minorities who live abroad. The Higher Education

Act makes citizens of seven countries, Albania, Kazakhstan, Kosovo, Moldova, North Macedonia, Serbia and Ukraine, eligible for state support to study in Bulgaria (Higher Education Act, 2025). In 2024, access to public university education was extended to applicants under temporary protection, who now receive the same status as Bulgarian students.

Most foreign students come from Greece (20%), the United Kingdom (13.7%), Ukraine (10%), Germany (9.5%), and Italy (6.3%). The largest share study health-related programmes, 61.5% overall and 45.8% in medicine specifically, drawn by the competitive cost and quality of Bulgarian medical education rather than by migration motives.

Two features limit this inflow's demographic contribution. First, most foreign students come from EU member states and return home after graduating, so the group is not a significant source of long-term labour migration. Second, and more important for the regional students the policy is meant to attract, Bulgaria offers no mechanism to retain graduates: there is no post-graduation job-search period, no access to subsidised student loans for foreign citizens, and only very limited permission to work while studying. Foreign students therefore represent a growing inflow whose conversion into lasting human capital is limited by the absence of retention policies, a gap that matters most for students from the Balkan minority communities the policy explicitly targets.

Cross-Border Migration with the Balkans

The Balkan dimension of Bulgarian migration stands out as both durable and structurally transformed. Harmonized OECD data (Figure 7) show a steady growth in the foreign-born population from most neighboring countries over the period 2015 – 2022, led by Türkiye and North Macedonia, with Serbia and Greece also recording increases. Only the data for Romania show a decline, reflecting its own convergence and internal mobility within the EU. These trends confirm that proximity and ethnicity continue to drive permanent settlement, even as flow data show that labour migration is reaching further afield.

The population classified by previous citizenship, points to the same regional concentration: in 2025, foreign-born residents of Bulgaria included about 21,377 former citizens of Türkiye, 11,165 of Greece, 5,888 of North Macedonia, and 3,945 of Serbia (Office of the President, 2025), mostly people naturalized through the channels described above who settled in the country.

The regional pattern is therefore uneven across channels. The most substantial regional inflows come through citizenship acquisition, concentrated among Bulgarian minorities in North Macedonia and increasingly in Ukraine, Türkiye, Serbia and Albania, although much of this acquisition serves onward EU mobility rather than settlement. The

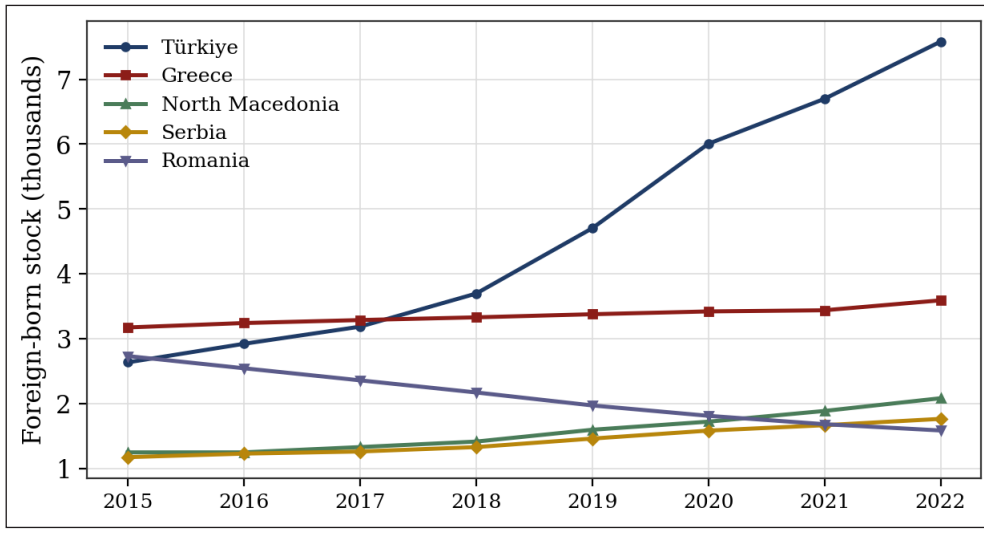


Figure 7. Foreign-born population from selected Balkan countries, 2015 to 2022 (thousands)

Source: *Authors' calculations based on OECD/SOPEMI data (OECD, 2025).*

Balkans also serve as a transit region for forced migration from further afield, with the Bulgaria-Türkiye and Bulgaria-Serbia borders as the main points of pressure. Cross-Balkan labour mobility, meanwhile, remains untapped relative to the region's mismatched labour markets, the clearest example of unused regional potential.

Bulgaria's accession to the land Schengen area on 1 January 2025 and its adoption of the euro on 1 January 2026 frame these processes. The expected surge in migrants after Schengen entry did not occur. Instead, cross-border travel with Greece (+17.2%) and Romania (+12.8%) increased, travel by EU citizens to Bulgaria rose 14.2% in the first seven months of 2025, and travel from third countries fell 11.1% (Ministry of Interior, 2025; Bobeva, 2025). The removal of internal border checks has, however, reduced the traceability of traffic and secondary movement, requiring compensatory police checks in a 30-kilometre border zone.

Conclusion

Since the start of the economic and political reforms of the 1990s, Bulgaria's migration pattern has undergone a deep transformation. Its early phase was marked by extremely intense flows, closely bound up with movement to and from neighbouring countries, while its current phase

is increasingly defined by immigration and return. This transformation shows up in the volume, structure and direction of the flows, in their underlying drivers, and in their economic effects.

Growing inflows and longer stays are changing both the stock and the flows. In 2024, the foreign-born population reached 212,000, or 3.3% of the total population, of whom 67.9% were of third-country origin (Bobeva, 2025). The OECD reports that this stock grew by 104% between 2014 and 2022, one of the fastest increases in the region. Longer stays, visible in the shift of residence permits toward longer validity, discussed above, show that immigration is becoming structural, with consequences for integration, public services and labour market regulation.

Ethnic ties and geographic proximity have had a substantial influence, shaping migration dynamics historically. But the economic factors, labour market conditions, joint infrastructure and investment projects, the cost and quality of education, and the purchase of holiday properties, all play a substantial role. Migration between Bulgaria and the Balkan countries therefore unfolds through every channel and form, with the most substantial regional inflows occurring through citizenship acquisition and the largest historical outflows taking the form of emigration to Türkiye and labour migration to Greece.

Bulgaria has moved from predominantly mass emigration to a pattern defined by immigration and return. Migration policy has grown progressively more liberal on labour migration, extending beyond the highly skilled to lower-skilled foreign workers, but the integration of migrants who remain after receiving residence still remains a challenge and has not received enough attention in the migration policy mix.

Two priorities follow for policy and research. The first is converting transitional inflows into lasting human capital. The absence of mechanisms to retain foreign students, of reintegration policies for returning citizens in specific age groups, and of settlement pathways for third-country workers all limit the long-run demographic and economic dividend of the immigration reversal. The second is realising the region's evident but untapped potential for labour mobility. Given the mismatch between Balkan labour markets and the persistence of ethnic ties and proximity, a coordinated regional labour market, comparable to the region's integrated energy market, offers a plausible framework within which cross-border migration could be managed to the mutual benefit of Balkan economies.

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Romania's Migration Faultlines in a Changing Migration System

Mihaela Matei

Introduction

Historically, the Balkans and South-Eastern Europe have been strongly associated with emigration, including labour migration, political migration, ethnic migration and displacement linked to conflict and regime change. Since the late 1980s and early 1990s, many Balkan countries have experienced outward migration. More recently, migration in the Balkans has become more multidirectional. Emigration now coexists with return migration, selective labour immigration, student mobility, transit migration, refugee movements and border-management pressures (OECD 2022; Koinova 2022).

Romania is part of this broader regional pattern, and its contemporary migration system has changed substantially over the past three decades. Before 1989, international mobility was shaped by ethnic and political dynamics, including minority-related movement and highly restricted emigration under the communist regime. Since the fall of the communist regime in 1989, international mobility has become one of the main forces shaping the country's demographic, economic and social development. In the early post-socialist period, migration was driven by economic restructuring, unemployment, wage differentials and the liberalisation of travel. After Romania's accession to the European Union in 2007, mobility consolidated large migration corridors towards Italy, Spain, Germany, the United Kingdom, and other Western and Southern European labour markets (Anghel and Horváth 2009; Anghel et al. 2016; Favell 2011; Iordache and Matei 2020). As a result, Romania is now one of the most important countries of emigration in Europe. By 2024, approximately 3.1 million Romanian citizens resided in other EU Member States, and OECD estimates suggest that nearly one-fifth of Romania's working-age population lives abroad (European Commission: Eurostat 2025; OECD

2019, 2025a). In comparative terms, Romania's emigration levels are among the highest in the Balkans, with larger absolute numbers and a higher share of population living abroad than neighbouring countries such as Bulgaria or Serbia. These figures underscore the structural nature of Romanian emigration, which constitutes a long-term feature of the country's integration into European labour markets.

A central paradox defines the current situation: Romania continues to experience large-scale emigration and the loss of its working-age population, while simultaneously facing labour shortages, demographic decline, and increasing demand for foreign workers. Recent trends indicate that Romania can no longer be characterised solely as a country of emigration (Anghel and Coșciug 2018; Coșciug 2022a, 2022b; OECD 2025b). Return migration has become a significant component of recorded immigration, and labour immigration from non-EU countries has increased substantially in response to shortages in sectors such as construction, manufacturing, hospitality, logistics, and services. Immigration remains selective and sector-specific. While it assists employers in addressing immediate shortages, it does not offset the scale of emigration or reverse demographic decline.

Recent research has increasingly emphasised the multidirectional character of migration in South-Eastern Europe (OECD 2022; Koinova 2022). In the Romanian case, however, the literature has often treated emigration, labour immigration, demographic decline and EU migration governance as partly separate fields of analysis. Studies on Romanian migration have documented the consolidation of transnational migration networks, the effects of EU accession, the emergence of immigration in a country historically defined by emigration, and the policy challenges linked to labour-market change (Anghel and Horváth 2009; Anghel et al. 2016; Anghel and Coșciug 2018; Coșciug 2022a, 2022b; OECD 2025b). What remains less developed is an integrated interpretation of how these processes interact to produce structural tensions within Romania's migration system.

The contribution of this chapter is to integrate these developments using the concept of migration faultlines (de Haas 2021; de Haas, Castles and Miller 2020; Hollifield, Martin and Orrenius 2022). Instead of treating emigration, immigration, demographic decline, labour shortages, and EU border governance as separate phenomena, the chapter analyses them as mutually reinforcing dimensions of a single, unbalanced migration system. The issue is not that existing studies are contradictory, but that different strands of research have often examined Romanian emigration, return migration, immigration, demographic decline, and EU governance in isolation. This integrated approach enables explanation of why labour immigration can increase even as demographic pressures persist, why return migration does not automatically resolve labour shortages, and

why Romania's EU membership simultaneously facilitates mobility and increases governance obligations.

This chapter pursues two main objectives. First, it provides an overview of Romania's current migration situation, encompassing both emigration and labour immigration. Second, it explains how these processes are interconnected through three migration faultlines – demographic, labour market, and geopolitical – while situating Romania within the broader Balkan and South-Eastern European migration context.

Data and Methodological Approach

This chapter adopts a descriptive and interpretative analysis of secondary statistical data, policy reports, and academic literature. This methodological approach is appropriate given the complexity of Romania's migration system and the limitations of available data. The multidimensional nature of migration processes, involving demographic, labour market, and geopolitical factors, often precludes straightforward causal inference. Additionally, official statistics may not capture all forms of mobility, such as temporary, circular, informal, or regional migration, complicating quantitative analysis. A descriptive and interpretative approach enables an integrated overview of the principal patterns and tensions shaping Romania's migration system, while accommodating the interrelated nature of migration flows, demographic decline, labour market pressures, and migration governance (Baumeister and Leary 1997; Snyder 2019). However, the reliance on secondary and aggregate data means that certain dynamics – such as individual migration motivations or the integration experiences of returnees and foreign workers – may not be fully captured. Recognising these methodological limitations, future research would benefit from collecting and analysing more granular, longitudinal, and disaggregated data, including subnational indicators, qualitative fieldwork, and primary surveys. This would enable more robust causal inference and a deeper understanding of underreported forms of mobility, helping address current data gaps and strengthen the analytical foundation for migration policy and theory.

The empirical analysis draws primarily on data from Eurostat, the OECD, the Romanian National Institute of Statistics, and the General Inspectorate for Immigration and Romanian labour market administrative sources. The main period covered is 2000 – 2025, which captures both long-term structural continuities and recent transformations, including the growth of return migration and the expansion of non-EU labour immigration.

The statistical analysis uses a selected set of indicators relevant to the three analytical faultlines. For the demographic faultline, the chapter examines the resident population, the labour force/labour resources,

population projections, and emigration flows. For the labour market faultline, it uses indicators on labour costs, job vacancies, employment permits and registered non-EU workers. For the geopolitical faultline, it considers indicators of asylum applications, temporary protection, and border governance. The indicators were selected because they capture the main dimensions of the argument: population contraction, labour-market pressure, selective immigration, and crisis-related governance. Where possible, data are presented for the period 2000 – 2025; shorter time series are used when institutional data are available only for recent years.

The chapter also relies on a targeted narrative review of academic and policy literature. Seminal studies on Romanian emigration and transnational networks are combined with more recent analyses from international organisations and policy institutions, particularly Eurostat, the OECD, the World Bank, and EU institutions. The literature is used to contextualise the empirical trends and to situate Romania within broader regional transformations affecting the Balkans and Eastern Europe. The literature review is targeted rather than systematic. Priority is given to recent literature and institutional reports published after 2020, while older studies are used when they are seminal to understanding Romanian migration networks, post-socialist mobility, or migration theory.

The analysis is organised around the concept of migration faultlines. The concept draws on migration systems theory, which understands migration as a set of interconnected relations between origin and destination areas, sustained by networks, institutions, feedback mechanisms, and policy regimes (de Haas 2021; de Haas, Castles and Miller 2020). It also draws on migration governance literature, particularly the tension between labour market demand for mobility and political efforts to regulate, control or externalise migration (Boswell 2003; Hollifield, Martin and Orrenius 2022; Triandafyllidou 2018). The faultlines framework is used here not to replace these approaches, but to identify the points where demographic decline, labour shortages, emigration, immigration, and governance pressures interact and produce structural imbalance.

The analysis proceeds in three steps. First, it describes the main trends in Romanian migration. Second, it interprets these trends from historical and regional perspectives, with particular attention to Romania's relations with the wider Balkan space. Third, it synthesises the findings across three analytical dimensions: the demographic faultline, linked to population decline and a shrinking labour supply; the labour market faultline, linked to skill loss and labour shortages; and the geopolitical faultline, linked to EU integration, border governance, regional mobility, and crisis-driven migration management.

A clarification is required regarding the use of data. Administrative data on foreign workers, employment authorisations, labour permits, asylum applications, and residence records reflect institutional registration practices. These data are valuable for identifying structural trends, but they do not provide exhaustive measures of all forms of mobility. The figures are used descriptively rather than for causal inference, with the aim of identifying convergent trends across demographic, labour market, and migration indicators to support the interpretation of structural faultlines.

Emigration

Emigration has been the defining feature of Romania's migration system since the fall of communism in 1989. In the early post-socialist period, outward mobility was shaped by economic restructuring, industrial decline, unemployment, falling living standards and the gradual liberalisation of travel. Migration initially developed through household strategies and informal networks, especially in regions affected by economic uncertainty. Over time, these movements became more stable and institutionalised, creating durable migration corridors between Romania and Southern, Western and Northern European labour markets (Anghel and Horváth 2009; Anghel et al. 2016).

Romanian emigration intensified after EU accession in 2007, when free movement progressively reduced legal and administrative barriers to work and residence in other Member States (Favell 2011; Matei et al. 2020; Iordache and Matei 2020). Italy and Spain were initially among the most important destinations, followed by Germany, the United Kingdom and other EU member states. Migration networks became self-reinforcing: earlier migrants provided information, housing, employment contacts, and support for new migrants, reducing the costs and risks of mobility.

The current scale of Romanian emigration is substantial. By 2024, approximately 3.1 million Romanian citizens were residing in other EU Member States, representing one of the largest intra-EU migrant populations (European Commission: Eurostat 2025). OECD estimates further indicate that nearly one-fifth of Romania's working-age population lives abroad (OECD 2019, 2025a).

A central paradox of the Romanian case is that emigration has persisted despite economic growth and increasing domestic labour shortages. The continued outflow of workers cannot be explained only by wage differentials, although income gaps remain important. It is also sustained by established migration networks, dissatisfaction with public services, limited trust in institutions, perceived corruption, uneven career

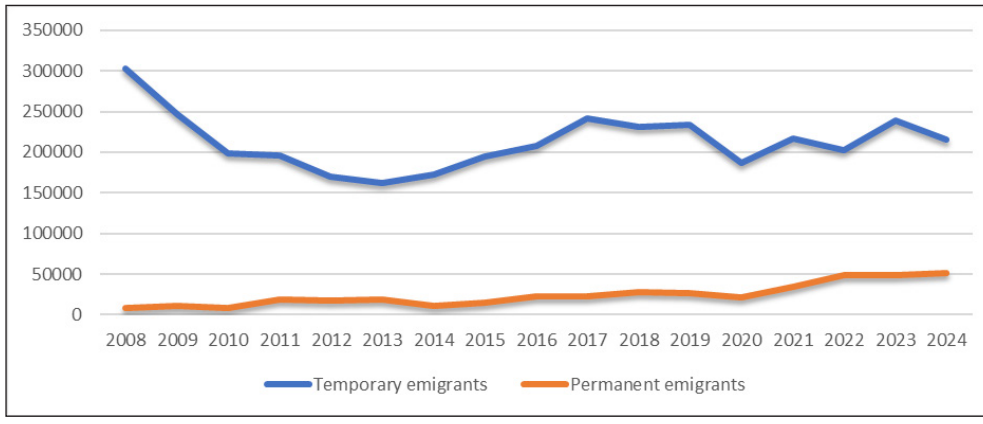


Figure 1. Permanent and temporary emigration from Romania, 2008 – 2024

Source of data: *Romanian National Institute of Statistics, TEMPO-Online.*

opportunities, and expectations regarding quality of life (Anghel and Horváth 2009; Anghel et al. 2016; de Haas 2021). These factors help explain why outward mobility remains attractive even when the Romanian economy itself requires additional labour.

Figure 1 presents the evolution of permanent and temporary emigration flows from Romania. The data confirm the persistence of outward mobility, although they should be read together with Eurostat stock data on Romanian citizens residing in other EU member states to capture the full scale of the diaspora.

Romanian emigration forms part of a broader Balkan and Eastern European pattern. Since the early 1990s, many countries in the region have experienced sustained outward migration driven by post-socialist transition, economic restructuring, conflict in parts of the former Yugoslavia, labour market instability, and widening development gaps between South-Eastern and Western Europe. Romania shares with countries such as Bulgaria, Serbia, Albania, Bosnia and Herzegovina, and North Macedonia the experience of population loss, ageing, regional depopulation and labour shortages linked to emigration (OECD 2022; Wankiewicz-Kłoczko 2025; World Bank 2018). However, Romania differs because of the scale of its diaspora and the extent to which its mobility has been embedded in the EU free movement regime.

Romanian migration to Türkiye, Greece and Bulgaria has remained much smaller than migration to Western Europe, but it reveals older regional and ethnic layers of mobility. In the early 1990s, Türkiye became an important destination for members of the Turkish and Tatar communities from Dobrogea, for whom mobility was shaped by ethnic, religious and linguistic ties, as well as by economic opportunities after the

opening of borders. A different form of return-oriented mobility concerned Greek political refugees and their descendants who had lived in Romania during the communist period after the Greek Civil War; after political liberalisation and the 1982 amnesty in Greece, many of them returned or reconnected with Greece, illustrating how Cold War displacement was later transformed into repatriation and renewed transnational mobility.

Studies of Romanian migration to Serbia describe forms of cross-border and ethnic mobility towards Romanian-speaking and Vlach communities in Vojvodina and Eastern Serbia (Sorescu-Marinkovic 2016). This pattern has been interpreted as 'reverse ethnic migration', because it involved movement towards Romanian or Vlach minorities across the border. These movements were shaped by proximity, shared language, family ties, labour opportunities, and the liberalisation of mobility after 1989.

For Bulgaria, the evidence points less to a comparable ethnic migration pattern and more to cross-border, educational, tourism-related, seasonal, and EU mobility. For Albania, Kosovo, Bosnia and Herzegovina, North Macedonia and Montenegro, Romania's links are more marginal than those of Türkiye, Greece or Serbia, with no large-scale ethnic or historical migration comparable to theirs (OECD 2022).

This evidence confirms that emigration is not merely a residual effect of post-socialist transition, but rather a continuing mechanism of Romania's integration into unequal European labour markets.

Immigration

Immigration has become an increasingly important, although still secondary, component of Romania's migration system (Anghel and Coșciug 2018; Coșciug 2022b; OECD 2025b). As the domestic labour force has contracted, employers have increasingly turned to foreign recruitment to fill shortages.

The first important feature of Romanian immigration is the predominance of return migration. A significant share of recorded immigration consists not of foreign nationals entering Romania for the first time, but of Romanian citizens returning from abroad. Immigration statistics in Romania must therefore be interpreted carefully. They capture not only Romania's growing attractiveness as a destination for foreigners, but also the circulation of its own citizens within the European migration system (Coșciug 2022a; OECD 2025b). Eurostat data indicate that in 2024 around 64.5% of immigrants were Romanian citizens.

Figure 2 shows that immigration to Romania has increased in recent years, but that this increase must be interpreted alongside the predominance of return migration and the growing, yet still selective,

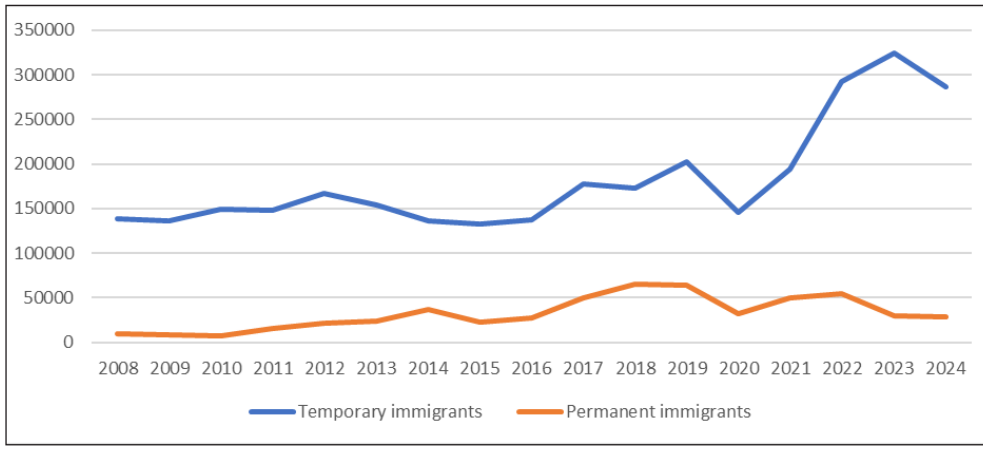


Figure 2. Permanent and temporary immigration in Romania, 2008 – 2024

Source of data: *Romanian National Institute of Statistics, TEMPO-Online.*

role of foreign labour immigration. There is also notable variation by region and sector: major urban centres such as Bucharest, Cluj-Napoca and Timișoara tend to attract the highest numbers of immigrants, including both foreign workers and returnees, due to greater economic opportunities, availability of services, and established networks. At the sectoral level, foreign labour immigration is concentrated in construction, manufacturing, hospitality, and logistics, with Bucharest and other industrial hubs serving as key destinations for non-EU workers. Return migrants are also more likely to settle in economically dynamic regions or their regions of origin, particularly those with stronger local labour demand. The scope of stay, from the visa categories for which IGI endorsement was requested, indicates the approximate purpose of stay in Romania: studies accounted for around 45% of the total requests, employment for around 35%, and family reunification for around 18%, the latter increasing by about 600 cases compared with the previous period.

The second major development is the expansion of labour immigration from non-EU countries. According to the General Inspectorate for Migration, Romania recorded more than 145,000 applications for employment permits in 2025, while almost 118,000 employment notices were issued. This indicates a significant increase in employer demand for foreign labour. Workers from countries such as Nepal, Sri Lanka, Bangladesh, Vietnam, India, Türkiye, and the Republic of Moldova have become increasingly visible in the Romanian labour market. Their presence reflects the growing dependence of certain sectors on international recruitment.

However, the changing composition of the foreign labour force also shows the limits of this adjustment. The strongest increases are concentrated among specific non-EU groups recruited for particular labour-market segments, suggesting that immigration is being used mainly as a sectoral response to shortages rather than as part of a broader demographic or skills strategy.

This development is not unique to Romania. Across South-Eastern Europe, several countries historically defined by emigration are increasingly becoming destinations for selected forms of immigration, although the scale and institutional context differ from country to country (OECD 2022).

Romania's regional migration space includes smaller but analytically relevant links with Serbia, Greece, and Türkiye. These flows are less visible in aggregate statistics than migration from Asian countries, but they are important for understanding Romania's place in a wider Balkan migration system. Türkiye is the most consistently visible country in this regional configuration. Administrative data show that Turkish citizens appear in indicators on legal residence, labour admission, and long-stay visas. Research on Turkish immigrants in Romania also shows that integration patterns vary by locality, group size, family formation, language use, religion, and community networks (OECD 2025b; Aydin 2010).

Serbia has a different profile. It is less significant as a source of regular immigration but more relevant to border governance, readmission, and the dynamics of the Western Balkan route (Council of the European Union 2025; IOM 2025). Romanian migration reports have repeatedly linked Serbia to irregular mobility, returns and the management of the western and south-western border. Conversely, research on Serbs in Romania shows that Serbian communities in Banat and the Danube Gorge have preserved identity through language, religion and minority institutions while facing demographic decline and assimilation pressures (Djuric-Milovanovic 2012).

Bulgaria and Greece are relevant mainly through EU mobility, regional transit, and Schengen governance, while Albania, Kosovo, and North Macedonia appear more selectively in data on repatriation and education. These patterns confirm that Romania's migration system is shaped not only by East-West mobility but also by Balkan- and Türkiye-related forms of circulation, labour recruitment, transit, and migration governance (OECD 2022; Council of the European Union 2025).

Educational mobility provides another indication of Romania's regional role. Romania attracts ethnic Romanian students (i.e. from Serbia or Albania) who benefit from a favourable admissions regime under the "Romanians from everywhere" framework with options for tuition-free places with or without scholarships, as well as foreign students

from Balkan countries and Türkiye. According to administrative data on foreign graduates in Romanian public universities for 2020 – 2024, Romania recorded graduates from several Balkan countries, including Serbia, Greece, Albania, Bulgaria, and North Macedonia, as well as Türkiye. Greek students, the largest group, illustrate a form of educational mobility: EU students' mobility to Romanian universities, mainly medical universities, where Romania has become attractive due to recognised degrees, foreign-language programmes and comparatively accessible costs.

Transit and crisis-related mobility add a further layer to Romania's immigration profile. Although Romania has not been the central state on the Western Balkan route, its position at the eastern and south-eastern frontiers of the European Union connects it to regional dynamics in border management, asylum and temporary reception.

The increase in immigration presents new policy challenges from a governance perspective (Scholten and Penninx 2016; Triandafyllidou 2018; Coșciug 2022b). These challenges include labour recruitment, migrant rights, working conditions, access to services, language acquisition, social protection, local-level integration, and long-term residence. Romania's integration infrastructure remains limited, particularly outside major urban centres. As a result, there is a risk that labour immigration will be addressed solely as an administrative response to labour shortages, rather than as a process necessitating comprehensive social, legal, and institutional support.

Emigration and immigration data reveal a structural asymmetry in Romania's migration system: outward mobility remains quantitatively dominant and demographically significant, while immigration is increasing but remains selective, sectoral, and insufficient to offset labour-force contraction. This asymmetry forms the empirical foundation for the three faultlines discussed below.

Migration Faultlines in Romania

The empirical patterns described above point to three interconnected migration faultlines. These are not separate variables, but analytical dimensions through which the Romanian migration system can be interpreted (de Haas 2021; de Haas, Castles and Miller 2020; Hollifield, Martin and Orrenius 2022). The demographic faultline captures the contraction of labour supply; the labour market faultline captures the mismatch between mobility, skills and policy capacity; and the geopolitical faultline captures the effects of EU integration, border governance and crisis-driven mobility. The framework is useful for situating Romania within the changing migration landscape of the Balkans.

Faultline	Core question
Demographic faultline	How do emigration, ageing and low fertility reduce Romania's available labour supply?
Labour market faultline	Why do labour shortages and skills mismatches persist despite return migration and rising labour immigration?
Geopolitical faultline	How do EU integration, border governance and regional crises shape Romania's migration system?

The three faultlines should not be viewed as separate explanatory variables. Their analytical significance derives from their interaction (de Haas 2021; de Haas, Castles and Miller 2020). These processes do not compensate for one another; rather, they reinforce structural imbalances and generate recurrent pressures for policy adjustment.

Demographic Faultline: Population Decline and Labour Supply Contraction

The first major structural tension concerns the decline in overall labour supply, driven by sustained demographic contraction alongside rising labour demand. Romania has experienced sustained demographic decline since the early 1990s, driven by emigration, low fertility and population ageing, while economic growth has simultaneously increased labour demand (Ghetau 2004; OECD 2025b). As a result, the total population has fallen from approximately 23 million to around 19 million, one of the most pronounced contractions in the European Union.

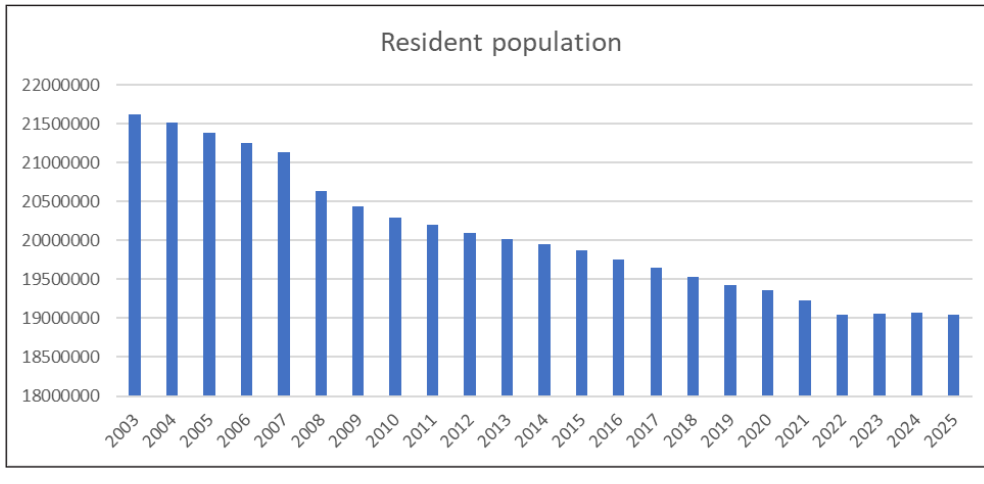


Figure 3. Population on 1 January

Source of data: *Eurostat, demo_pjan.*

As shown in Figure 3, Romania's resident population has followed a continuous downward trajectory, confirming the long-term character of demographic contraction.

The demographic consequences of emigration are significant. Migration is selective by age and skill, involving large numbers of working-age adults and, in some sectors, highly qualified professionals. This contributes to labour force contraction, population ageing and regional depopulation.

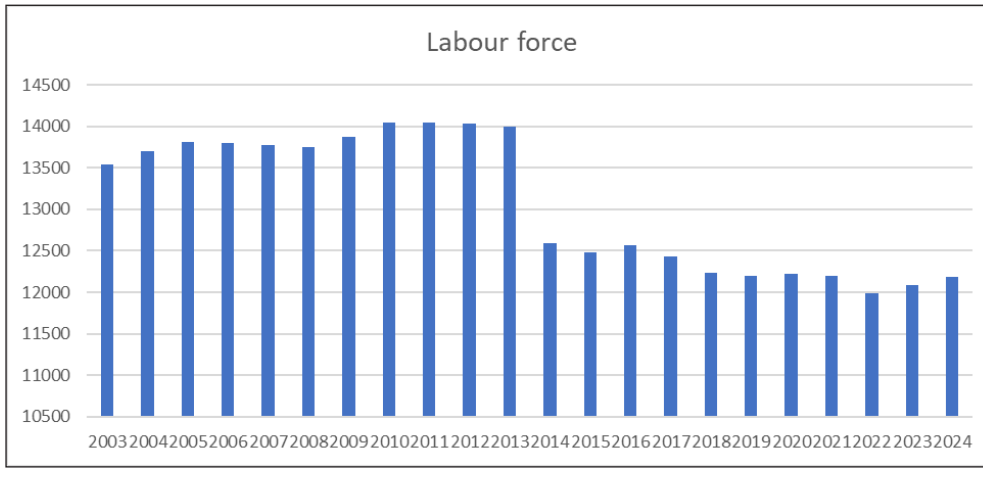


Figure 4. Labour resources, thousands of people

Source of data: *Romanian National Institute of Statistics, TEMPO-Online.*

Figure 4 illustrates the reduction in Romania's labour force. This has contributed to labour shortages across sectors, indicating that the imbalance between labour supply and demand is structural rather than merely cyclical. The spatial dimension further reinforces the demographic faultline. For example, counties such as Vaslui, Teleorman, and Caraș-Severin, as well as regions in the north-east and south of the country, are among the most severely affected by depopulation and youth outmigration. Smaller towns like Bârlad or Dorohoi, and rural areas throughout Oltenia and southern Moldova, continue to experience population decline, school closures and shrinking local economies. Meanwhile, major urban centres such as Bucharest, Cluj-Napoca, and Timișoara are partially buffered by internal migration but are themselves increasingly affected by labour shortages, particularly in construction, healthcare, and IT sectors. Although remittances support household income and local consumption, they do not compensate for the long-term loss of labour, skills and demographic vitality.

This pattern is not specific to Romania. Demographic contraction is one of the defining features of the wider Balkan region (World Bank 2018; OECD 2022; Wankiewicz-Kłoczko 2025). While the intensity and timing of these processes vary, the general pattern is similar: outward migration and demographic decline reduce the available labour force, while economic development and sectoral restructuring create continued demand for workers.

Labour immigration is one of the mechanisms through which Romania responds to these demographic pressures (OECD 2025b).

Table 1. Registered non-EU workers in Romania by nationality, 2020 – 2025.

Nationality	01.09.2025	31.12.2024	31.12.2023	31.12.2022	31.12.2021	31.12.2020
Nepal	44,071	36,239	22,019	15,217	6,253	3,267
Sri Lanka	19,715	19,262	16,343	9,843	4,135	2,632
Türkiye	11,546	11,601	10,086	10,537	8,731	6,888
India	11,307	10,317	8,843	5,911	4,029	2,380
Moldova (Republic)	7,615	6,642	5,940	5,587	4,657	3,469

Source: *Romanian Labour Inspectorate, administrative data on registered employees/workers.*

The table should be interpreted as an indicator of the changing composition of Romania's foreign labour force, showing the rapid growth of specific non-EU labour groups and the increasing importance of international recruitment in sectors affected by labour shortages.

Although immigration is increasingly significant, it only mitigates specific labour shortages and does not reverse population ageing or the long-term decline in the working-age population (OECD 2025b; Wankiewicz-Kłoczko 2025).

Long-term projections further underscore the persistence of this faultline.

As shown in Figure 5, Romania's population is expected to continue declining under all projected scenarios. This suggests that demographic pressures will intensify, further reducing the labour force and increasing pressure on pensions or healthcare.

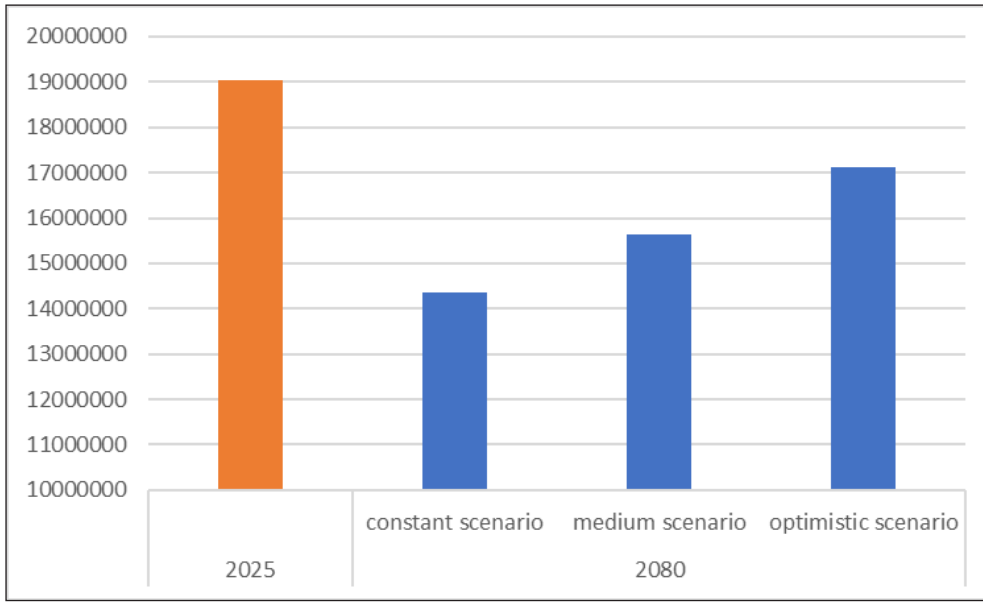


Figure 5. Resident population in 2025 and projected population in 2080

Source: *Romanian National Institute of Statistics.*

The demographic faultline demonstrates that Romania's labour-supply problem is structural rather than temporary. Emigration reduces the domestic stock of working-age and skilled workers, low fertility limits the entry of younger cohorts into the labour market, and population ageing increases the proportion of people outside working age. These processes collectively shrink the available labour force, even as economic demand for workers remains substantial. Labour immigration functions as an adjustment mechanism and influences Romania's long-term development trajectory. Although this imbalance is not unique to Romania, the scale of Romanian emigration intensifies its structural impact.

Labour Market Faultline: Brain Drain, Skill Mismatch and Policy Capacity

The second major structural tension concerns the qualitative and institutional dimensions of labour supply.

Emigration has important labour market effects. The departure of workers has contributed to shortages in sectors such as healthcare, construction, manufacturing, transport, services, and care work. Skilled emigration is particularly relevant because it affects not only labour supply, but also institutional capacity and public service provision (Docquier and Rapoport 2012; Matei and Iordache 2023).

Over the past decades, Romania has experienced significant outflows of professionals (OECD 2019; Matei and Iordache 2023). These migration patterns reflect Romania's integration into the European labour market, where demand for skilled workers remains high. Across South-Eastern Europe, skilled and working-age emigration has also generated shortages in healthcare, education, engineering, construction, transport and services.

A key structural driver of this process is the persistence of wage differentials between Romania and more developed EU economies. Eurostat data show that in 2024 average hourly labour costs in Romania remained far below those in Western and Northern Europe. These disparities create strong incentives for skilled workers to seek employment abroad, where returns to human capital are significantly higher (Docquier and Rapoport 2012; Iordache and Matei 2020; OECD 2019). In addition to wage gaps, working conditions, institutional quality, career opportunities, and access to infrastructure further reinforce outward mobility.

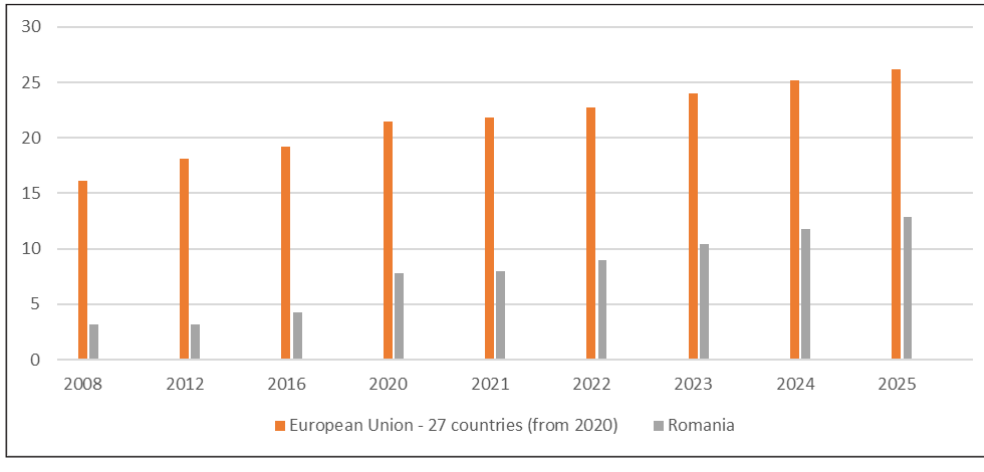


Figure 6. Labour costs: wages and salaries, Romania and EU-27, selected years

Source of data: *Eurostat, lc_lci_lev.*

The healthcare sector provides a particularly illustrative example. Medical emigration affects not only labour supply, but also public service provision, regional inequality and institutional capacity (Matei and Iordache 2023). The departure of doctors and other health professionals weakens the domestic health system, particularly outside major urban centres. Similar dynamics can be observed in other areas requiring specialised human capital.

At the same time, Romania faces labour and skills shortages across both high-skilled and medium- to low-skilled occupations. Employers report difficulties not only in filling vacancies in sectors such as construction, manufacturing and services, but also in finding workers with the specific skills required for these positions, reflecting a mismatch between labour demand and the available skills profile of the workforce.

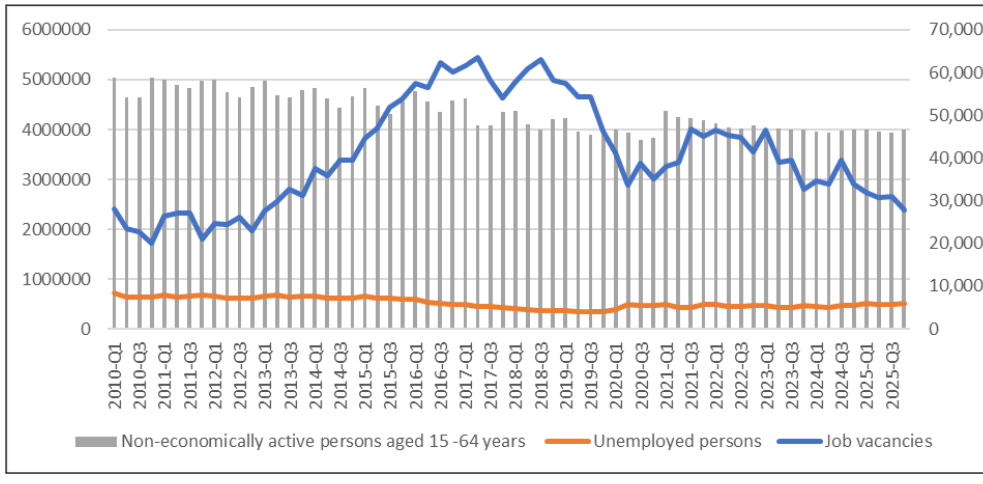


Figure 7. Job vacancies, quarterly data, 2010 – 2025

Source of data: *INS, Eurostat, jvs_q_nace2.*

Figure 7 indicates persistent labour demand and recruitment difficulties, supporting the interpretation of labour shortages as a structural rather than temporary problem.

At the same time, the Cedefop ESI data for 2024 indicate that Romania faces persistent skills-mismatch challenges, with a score of 91 for low-wage workers with medium and high levels of education, 64 for qualification mismatch, and 61 for overqualification among tertiary graduates, suggesting that available qualifications are not always effectively matched to labour-market demand.

The Romanian labour market faultline is thus characterised not only by the absence of workers, but also by the coexistence of labour shortages with unemployment, inactivity, and skills mismatch (OECD 2025b). Available labour does not necessarily correspond to the sectors, skills, locations, or working conditions where demand is rising. This indicates that the problem is quantitative, qualitative, and institutional.

Labour immigration partially addresses shortages. This produces a dual imbalance: Romania loses skilled workers to more developed labour markets while relying on foreign workers mainly to cover immediate shortages in lower- and medium-skilled sectors (OECD 2025b). Similar

patterns are increasingly visible across the Balkans, where countries remain exporters of labour while also becoming importers of workers for specific sectors (OECD 2022).

A feature of the Romanian labour market faultline is the limited capacity of public policy to respond strategically. Policies aimed at retaining skilled workers, incentivising return migration or attracting foreign talent remain fragmented and insufficiently aligned with labour market needs (Coșciug 2022a). Although certain programmes have been introduced, their impact has been limited due to inconsistent implementation and lack of coordination. Notably, initiatives to retain healthcare professionals through salary increases have slowed but not halted emigration in that sector. Conversely, policies supporting language integration and targeted recruitment from non-EU countries in construction and services have shown some success in filling acute vacancies, though challenges related to integration and long-term retention persist. As a result, labour mobility often produces cumulative negative effects: skilled emigration reduces the domestic stock of human capital, while limited return and retention policies prevent the country from rebuilding this human capital base effectively.

The labour market faultline demonstrates that Romania's shortages persist because the issue is not solely quantitative, but also qualitative and institutional. Return migration and labour immigration increase the number of available workers, but do not automatically replace skilled professionals or ensure that available labour aligns with the sectors, occupations, and locations where demand is greatest. Skilled emigration continues to diminish Romania's stock of human capital, while wage differentials, working conditions, and career opportunities sustain outward mobility.

Geopolitical Faultline: EU Integration, Border Governance and Crisis-Driven Mobility

The third structural tension concerns the institutional and geopolitical context of migration governance. Romania's integration into the European Union produces a dual effect. On the one hand, it facilitates large-scale labour mobility through the free movement regime, reinforcing outward migration and Romania's integration into European labour markets (Favell 2011; Matei et al. 2020). On the other hand, it imposes obligations in the areas of border control, asylum management, visa policy, readmission, external cooperation, and crisis response (European Commission 2024; Council of the European Union 2024).

EU migration governance has increasingly combined formal legal instruments with operational coordination, external cooperation, funding instruments and crisis-response mechanisms (Boswell 2003; Cardwell

2023; Niemann and Zaun 2023; Halilovic 2024; Tsourdi, De Bruycker and De Somer 2025; Vara 2023). For Romania, this means that migration governance is mediated not only by national legislation, but also by EU priorities, border management tools, agency coordination, and emergency response frameworks. The Pact on Migration and Asylum further reinforces this connection by linking asylum procedures, border management and solidarity mechanisms within a common EU framework (European Commission 2024; Council of the European Union 2024).

Romania's position at the EU's eastern and south-eastern frontier makes it particularly exposed to this mode of governance. As an example, asylum applications and broader mobility patterns are sensitive to developments in the regional geopolitical environment, especially instability in neighbouring states and along regional mobility routes (Council of the European Union 2025; IOM 2025). Since the outbreak of the military conflict between Ukraine and the Russian Federation, the number of displaced persons entering or remaining in Romania has declined significantly over the past three years. Between 1 January and 31 December 2025, the General Inspectorate for Immigration registered 37 asylum applications submitted by Ukrainian citizens displaced by the conflict. By contrast, since the beginning of the conflict, residence permits have been issued or reissued for a total of 201,890 beneficiaries of temporary protection, of whom 199,358, or 98.7%, were Ukrainian citizens.

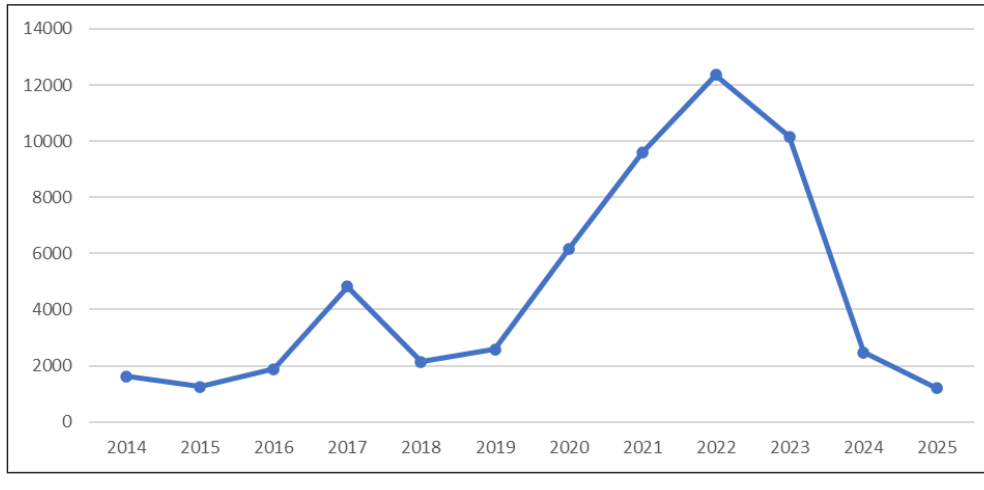


Figure 8. Evolution of the number of asylum applications registered in Romania, 2020 – 2025

Source: *General Inspectorate for Immigration, Romania.*

As illustrated in Figure 8, asylum applications fluctuate in response to external events and changes in regional mobility routes. The war in Ukraine made Romania's crisis-response role especially visible, although Ukrainian displacement was largely managed through the EU temporary protection framework rather than through the ordinary asylum channel (European Commission 2024).

Romania's geopolitical position is shaped by its location between the Balkans, the Black Sea region and the eastern frontier of the European Union (Council of the European Union 2025; IOM 2025). It is simultaneously a sending country, a country of return, an emerging country of labour immigration, a transit and reception space during crises and an EU border state. This layered position differentiates Romania from some Western Balkan countries that remain outside the EU, while also connecting it to broader South-Eastern European migration dynamics.

The Balkan region occupies an important place in this governance configuration. The Western Balkan route has made South-Eastern Europe a key space of transit, control, humanitarian response, and border management (Frontex 2025). Although Romania has not been the main state on this route in the same way as Serbia, North Macedonia, or Bosnia and Herzegovina, its geographic position and EU membership connect it to broader efforts in regional mobility management. Migration through and around the Balkans illustrates how mobility, asylum, border control, readmission, and cooperation with neighbouring states increasingly intersect (Council of the European Union 2025; IOM 2025).

Recent Frontex data show that mobility along the Western Balkan route is highly sensitive to enforcement practices, cooperation with neighbouring states and EU-level border management priorities (Frontex 2025).

The geopolitical faultline therefore reflects more than a simple tension between mobility and control (Boswell 2003; Hollifield, Martin and Orrenius 2022; Niemann and Zaun 2023; Triandafyllidou 2018). It captures the interaction between EU free movement, external border governance, regional transit routes, crisis-driven displacement, and European migration policy instruments. Romania is affected by EU mobility rules that facilitate emigration, by border and asylum obligations linked to its position at the Union's frontier, by regional instability in Ukraine and the Republic of Moldova and by wider Balkan transit dynamics.

The geopolitical faultline demonstrates that Romania's migration system is shaped by the combined effects of EU integration, border governance, and regional crises. EU membership facilitates outward mobility while also placing Romania within a broader framework of border control. The Ukrainian displacement context exemplifies this dual role: Romania served as a transit and reception space, with most

displaced Ukrainians managed through temporary protection rather than the ordinary asylum channel. Concurrently, regional mobility through and around the Balkans connects Romania to wider dynamics. These processes unfold within an EU governance context that both enables mobility and intensifies regulatory control, resulting in a migration system characterised by cumulative pressures and ongoing adjustment.

Limitations and Uncertainties

Several limitations affect the interpretation of these findings. First, certain forms of mobility, particularly circular, temporary, seasonal, informal, educational, family-related, and short-distance cross-border movements, remain difficult to measure and may be underestimated in official statistics (OECD 2022; OECD 2025a). This is relevant for analysing migration within the Balkans, where mobility may take short-term or recurrent forms that are not fully captured by standard datasets.

Second, the analysis does not employ formal statistical testing. The argument should therefore be read as conceptual and interpretative rather than econometric (Baumeister and Leary 1997; Snyder 2019). The regional Balkan dimension is also necessarily selective. The chapter does not provide a comprehensive comparative analysis of all Balkan countries; instead, it uses the regional context to interpret Romanian migration dynamics and identify patterns that may be relevant beyond the national case. Future comparative research could profitably explore in greater depth the experiences of other Balkan countries, or examine regional aspects such as student mobility or the governance of circular and seasonal migration. This would help address gaps in the understanding of both convergent and divergent migration trends across the region.

Future research should test the faultlines framework through comparative analysis with other Balkan countries and through more detailed subnational data on labour shortages, return migration and foreign-worker integration.

Conclusion and Policy Implications

Migration has become a central factor in Romania's demographic, economic and social development. Since 1989, Romania has moved from a predominantly emigration-driven migration profile to a more complex, multidirectional system (Anghel et al. 2016; Anghel and Coșciug 2018; Coșciug 2022b; OECD 2025b). Large-scale emigration

remains structurally dominant, but it now coexists with return migration, temporary and circular mobility, selective labour immigration, student mobility, asylum-related movements, and temporary protection.

The chapter has shown that Romania's current migration situation can be understood only by examining emigration, return migration, labour immigration, educational mobility, and crisis-related mobility together, rather than as separate processes.

The analysis confirms that the three faultlines identified in the chapter are mutually reinforcing. The demographic faultline is visible in population decline and labour-force contraction; the labour market faultline in the coexistence of labour shortages, skilled emigration and selective immigration; and the geopolitical faultline in Romania's simultaneous exposure to EU free movement, border governance and crisis-driven mobility.

The findings indicate that migration policy should not be addressed in isolation from demographic and labour market policy. While labour immigration may alleviate immediate shortages, it cannot reverse population ageing or compensate for the long-term loss of working-age and skilled workers. A more coherent policy approach would require linking migration governance with labour-market planning, skills development, return migration, foreign-worker integration, and regional development.

The analysis also indicates that Romania's migration policy should place greater analytical and strategic emphasis on the Balkan regional dimension. Migration involving Romania is not organised only along an East-West axis, but also includes regional mobility involving Serbia, Bulgaria, Greece and Türkiye. These links include labour migration, student mobility, ethnic and minority-related movement, transit, and border governance.

Looking forward, several areas offer promising directions for further research. Informal and unrecorded forms of mobility, such as circular, seasonal, or short-range cross-border migration, remain under-researched due to data limitations. Additionally, examining long-term integration outcomes for returnees and foreign workers in Romania, particularly outside major urban centres, could provide valuable insights. In this context, concrete research questions for future study include: What are the main drivers and patterns of informal circular migration between Romania and its neighbouring countries, and how do these flows impact local labour markets? How do return migrants and foreign workers experience social and economic integration in Romanian towns and rural areas, and what factors shape their long-term settlement outcomes? Addressing these questions would help fill critical gaps in the literature and provide a stronger empirical and theoretical basis for shaping Romania's migration and integration policies.

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Facing New Migration Reality in Serbia

Danica Šantić, Natalija Perišić, Dejan Pavlović

Introduction

The Republic of Serbia historically experiences heterogeneous migration patterns encompassing emigration, immigration, and transit migration. Historically, emigration was primarily conditioned by underlying economic and political factors. During the socialist period, it was the only country in the region that allowed citizens to travel abroad without requiring exit visas or subjecting them to any additional restrictions. Furthermore, Yugoslav citizens were permitted to work abroad, as institutionalised by bilateral labour agreements such as the 1968 *Anwerbeabkommen* with West Germany, enabling both Serbia and the SFRY to advance transnational cooperation across Europe. A major structural outcome of emigration abroad was the establishment of an extensive diaspora, particularly across Western Europe and overseas. According to official census data, between 300,000 and 400,000 citizens of the Socialist Republic of Serbia left the country for temporary employment in the West during the socialist period, particularly between 1965 and the late 1980s. This resulted in the formation of large diasporas abroad, with the largest communities emerging in what was then West Germany, as well as in Switzerland and Austria. Over time, this global network has proven vital to national development, serving not only as a economic stabilizer through substantial remittance flows but also as a bridge for knowledge exchange, foreign direct investment, and cultural diplomacy (Strategy of Economic Migration, 2020).

The second major period of emigration occurred in the wake of the dissolution of the former Yugoslavia. This outflow diverged fundamentally from prior mobility patterns, as it was predominantly coercive, driven by armed conflict, systemic economic breakdown, and political instability. The structural composition of this migratory stream likewise underwent a

marked transformation; academic estimates indicate that approximately 80% of those who emigrated during this period possessed high-level qualifications and tertiary education. Concurrently, traditional Western European destinations introduced tighter entry restrictions, diminishing accessibility for incoming migrants. This shift altered established trajectories, giving rise to long-distance, transoceanic migration corridors to Australia, the United States, and Canada. Simultaneously, this era was defined by a dual migration dynamic. Alongside emigration, Serbia experienced intensive immigration, marked by the arrival of refugees and forced migrants from neighboring former Yugoslav republics and territories home to Serbian populations (Šantić, 2015). Over the past three decades, these turbulent migration dynamics have endured, continually reconfigured by the protracted displacement and socio-economic integration of refugees and internally displaced persons across the region.

The third period of migration has taken place over the last decade, marked by significant structural shifts in the causes, destinations, and overall impacts of population mobility. Alongside the continued outward migration of skilled professionals and young labour force participants seeking opportunities abroad, Serbia's migration profile has increasingly diversified. In parallel, the country has experienced a rise in economic immigration, as labor market shortages across critical industries have prompted an influx of foreign workers. Furthermore, Serbia has faced broader international mobility dynamics, including the transit and arrival of asylum seekers and refugees from countries in Asia and Africa, irregular migrants, and returnees under the Readmission Agreement (Šantić, Trnavčević, 2022).

Building upon these historical trajectories and contemporary shifts, recent decades have witnessed a marked increase in both the volume and complexity of spatial mobility within the country. These intersecting dynamics marked by simultaneous emigration, labour immigration, transit movements, and internal shifts have deepened both the structural drivers and broader socioeconomic implications of migration in Serbia. Addressing these evolving mobility trends necessitates the development of an adaptive migration policy anchored within the broader framework of national development strategies. Within the regional matrix, Serbia stands out as a critical focal point, rapidly shifting from a traditional labor-exporting country into a prominent labor-importing destination (Arandarenko, 2020; Statistical Office of the Republic of Serbia [SORS], 2025; IOM, 2026). Tracking these developments is crucial, as an abundance of empirical data documents the vital role labor migration plays for societies navigating intense economic restructuring and demographic change (International Labour Organization [ILO], 2024).

Within this evolving context, labor mobility functions as a multi-dimensional demographic and socioeconomic process encompassing both internal spatial redistribution and international migratory flows. Current diversifying migration trends in Serbia must be contextualized within broader demographic, economic, and social transformations, including low fertility rates, a shrinking cohort of young labor market entrants, population aging, and ongoing emigration. Under these structural constraints, targeted labor immigration serves to mitigate acute labor shortages, sustain economic productivity, and preserve long-term developmental stability. Concurrently, the rising volume of foreign nationals arriving for economic, familial, educational, and protective reasons necessitates systematic monitoring of immigration flows – specifically regarding their scale, demographic composition, and underlying determinants – to establish an empirical foundation for sustainable migration governance and evidence-based integration policy.

Migration Drivers and Consequences

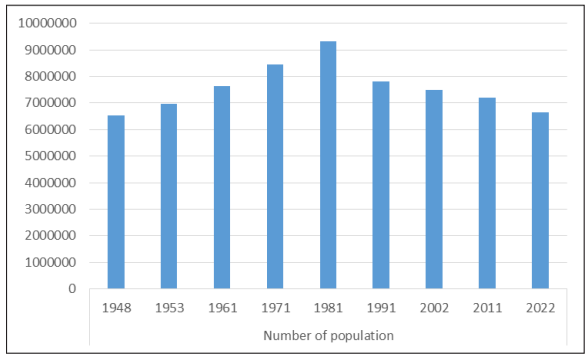
Recent Demographic Changes

Longitudinal data tracking foreign nationals residing in Serbia for at least one year indicate a substantial rise in long-term immigration between 2012 and 2023.[1] Specifically, the number of foreign residents surged from 4,279 in 2012 to 41,273 in 2023, representing an almost tenfold increase (SORS 2025). These trends reflect profound shifts in Serbia's migration profile, as the country has increasingly transitioned from a predominantly emigration and transit zone into a destination for diverse categories of migrants, including labour migrants, highly skilled professionals, digital nomads, entrepreneurs, and individuals displaced by geopolitical instability.

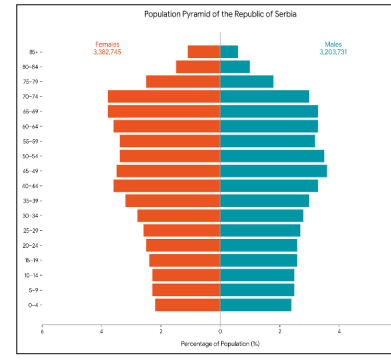
These migration processes unfold against Serbia's long-term demographic challenges: depopulation, aging, low fertility, and continuous emigration. Characterized by one of Europe's fastest rates of population decline, Serbia has experienced a structural demographic

[1] International migration data are collected in accordance with UN Recommendations on Statistics of International Migration and EU Regulation No. 862/2007. In Serbia, immigration tracking relies on Ministry of the Interior administrative registries for temporary residence, work permits, and permanent settlement. These data capture annual immigration flows by mapping the volume and demographic structure of foreign nationals shifting their country of usual residence for a minimum duration of 12 months.

contraction since the 1990s. The 2022 Census starkly confirmed this longitudinal decline, registering 6,647,003 residents[2], a net reduction of nearly half a million (495,975) since 2011. Highlighting the severity of this depopulation, the 2022 figure effectively reverts the country to its 1961 historical baseline (6,641,962), erasing six decades of demographic growth (Graph 1; Nikitović n.d.; SORS 2025).



Graph 1: Population change in Serbia, 1948-2022



Graph 2: Population pyramid, 2022

(SORS, 2025)

Beyond population decline, Serbia is experiencing a structural shift toward demographic aging. Empirical indicators show that the country has roughly 1.5 million residents aged 65 and older (22.6%), including over 320,000 individuals in the 80+ cohort (4.6%), alongside an advanced mean age of 44 years. This aging process is projected to persist over the coming decades. Medium-variant forecasting models predict that by 2052, the 65+ demographic will reach 28.5%, while the 80+ cohort will increase to 7.3%. By mid-century, the youth demographic (0–14) is expected to equal only half the size of the elderly population, driving the mean age up to 46.4 years by 2052 (Graph, 2; SORS 2026).

Contemporary depopulation and structural ageing in Serbia are deeply rooted in emigration periods that have structurally altered the country's demographic composition over the last six decades. The cumulative toll of these historical and protracted outflows is substantial; United Nations estimates indicate that the total stock of the Serbian diaspora reached approximately 950,000 individuals by 2019 – equivalent

[2] The Census was not conducted on the territory of the Autonomous Province of Kosovo and Metohija, which is under the administration of UNMIK in accordance with United Nations Security Council Resolution 1244.

to roughly 14% of the domestic resident population (excluding Kosovo*) [1] (Arandarenko, n.d.). This sustained, youth-selective out-migration has severely depleted the country's reproductive and productive cohorts. By eroding the core of the age-sex pyramid, emigration has directly accelerated the contraction of the working-age population while expanding the economic dependency ratio. Under these structural constraints, inbound labor migration has acquired critical demographic and macroeconomic urgency, driven by acute labor market deficits across strategic sectors. This domestic trajectory reflects a systemic global shift wherein traditional labor-exporting states are increasingly forced to manage depopulation and workforce exhaustion (Katsiaficas & Kessler, 2026). Consequently, foreign labor governance and structural migrant integration have emerged as imperative national policy directives and primary vectors of empirical research.

Economic Migration and Structural Drivers

Historically characterized as an emigration-driven origin state, Serbia's position within international mobility dynamics has undergone a fundamental shift. Recent economic restructuring, persistent labor market shortages, and sustained inflows of foreign direct investment have contributed to its gradual transformation into an emerging destination for foreign labor, as well as a strategic transit hub along broader migration corridors. In recent years, Serbia has become an increasingly attractive environment for foreign workers and international entities alike. From a rapidly expanding technology sector to large-scale infrastructure and construction projects, structural demand for foreign workers and a broader migrant workforce continues to escalate. While this trend yields clear benefits for enterprise productivity and cross-border mobility, it simultaneously introduces complex regulatory, legal, and compliance imperatives across institutional frameworks.

Serbia's strategic framework has only recently introduced the topic of labour immigration with Economic Migration Strategy for the period 2021 – 2027 and its goals, among others, attracting foreign professionals (Economic Migration Strategy, 2020). The expanding presence of migrant workers in Serbia is documented through an evolving national institutional framework. This shifting dynamic is formally substantiated by national statistics; since 2025, the Statistical Office of the Republic of Serbia (SORS) has tracked and mapped the immigration of foreign nationals as a distinct and increasingly significant segment of the country's population policy (SORS, 2025). Institutionally, this process is supported by close data-sharing cooperation between SORS and the Ministry of the Interior, aimed at establishing regular annual monitoring

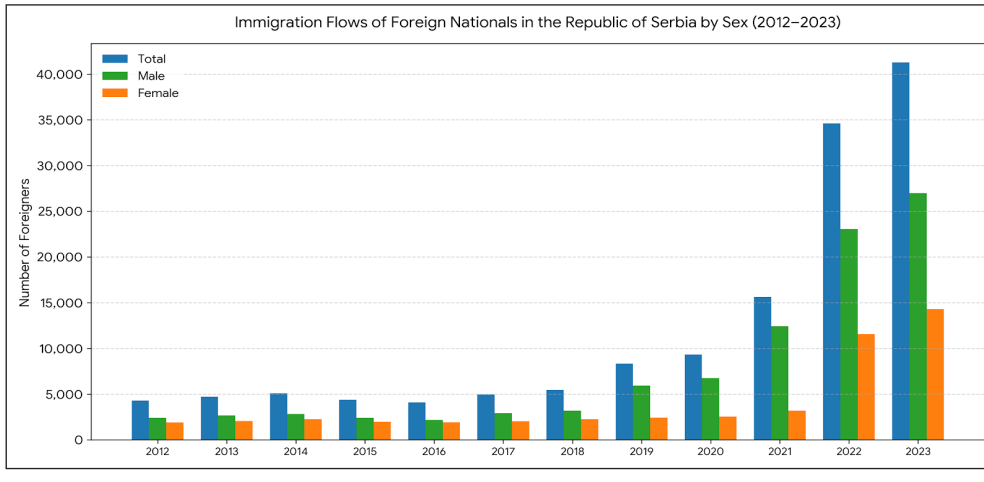
of international migration trends by integrating multiple administrative data sources. Complementing this framework, the National Employment Service (NES) provides critical empirical depth regarding the labour market through its active registry of work permits issued to foreign nationals. Furthermore, these multi-sectoral institutional insights are annually consolidated by the Commissariat for Refugees and Migration of the Republic of Serbia (SCRM) within its official publications Migration Profile[3]. The latter synthesizes administrative registers from across agencies to systematically track labor immigration trends alongside broader demographic shifts (SCRM, 2025). Operating within this integrated multi-agency framework, state authorities monitor immigration trends using standard statistical indicators, developed and refined in cooperation with the Eurostat. The SORS data tracks foreign nationals who relocated their usual residence for at least 12 months, providing a data matrix covering the 2012 – 2023 period, which is further amended by available figures for 2024 (SORS, 2025).

As Serbia's foreign workforce rapidly diversifies, the structural shifts in the labour market give rise to pressing questions regarding the long-term integration of migrant workers into society. Rather than viewing migrant integration solely through informal social dynamics, the process is best understood through the lens of institutional governance and regulatory architecture. Effective integration in transitional economies relies primarily on formal administrative mechanisms, including institutional accessibility, legislative alignment with international standards, transparent legal status determination, and streamlined legal pathways for labor market entry. On a macro level, cross-border labor movement is governed by structural economic wage differentials and state-managed recruitment channels. Within this framework, state policy serves as the primary stabilizing mechanism, balancing domestic economic labor requirements with managed migrant integration, legal protections, and strategic administrative oversight.

The demographic structure of the foreign nationals indicates the growing significance of immigration for Serbia's labour market and demographic development. Reflecting this shifting demographic landscape, long-term foreign stays (over one year) in the Republic of Serbia multiplied tenfold between 2012 and 2023 (Graph 3). The majority of permits in 2023 were issued to men (26,972), representing approximately two-thirds (65.4%) of all approvals, while women received 14,301 (34.6%). The average age is 32.6 years, strongly dominated by the

[3] As migration in Serbia constitutes a multi-sectoral phenomenon, data collection spans multiple government bodies, notably the Ministry of Foreign Affairs and the Ministry of Education, alongside various other state institutions.

working-age population, which accounted for 88% of all immigrants. The share of children is 10.6%, with the highest proportion in the Belgrade region, accounting for 52.6%. Children represented 10.6% of the foreign population, suggesting that immigration to Serbia is not exclusively temporary or employment-based, but includes longer-term settlement and family migration (SORS 2025). The share of the elderly population is only 1.4% (SORS 2025). Such developments raise important questions regarding access to education, healthcare, housing, labour market participation, and broader social integration.



Graph 3: Immigration Flows of Foreign nationals by Sex, 2012 – 2023 (SORS and IOM 2026)

The spatial distribution of foreign nationals was highly concentrated in Serbia's largest urban centers. Approximately 73% of all foreign nationals resided in 13 local self-government units, most of them in Belgrade and Novi Sad. This concentration suggests that integration processes are likely to be shaped by local institutional capacities, labour market opportunities, housing conditions, and the broader social environment of major urban areas. Disaggregated by citizenship, nationals of the Russian Federation, the People's Republic of China, Turkey, and India accounted for 83.5% of all foreign nationals residing in Serbia for more than one year in 2023. This trajectory continued into 2024, when the overall population of foreign nationals reached 101,413 individuals, 59.1% of whom were men. Russian (52.4%) and Chinese (12.1%) citizens comprised the vast majority, alongside notable cohorts from India and Turkey. Concurrently, immigrants from neighboring Balkan countries constituted roughly 10% of total inward flows in 2024, highlighting Serbia's emerging position as a central destination within intra-regional Balkan migration dynamics (SORS, IOM, 2026).

According to data from the NES, foreign workers were most frequently employed in construction, hospitality, tourism, service activities, infrastructure projects, and seasonal agricultural work. At the same time, a significant number of work permits were issued in the information technology sector, reflecting the increasing demand for both low-skilled labour and highly qualified professionals (SORS, IOM, 2026). The diversification of migrant labour profiles demonstrates that contemporary immigration to Serbia encompasses both low-skilled and highly skilled migration streams, generating distinct integration experiences and challenges.

Return Migration

Serbia's experience with return migration is specific, combining voluntary and forced returnees. The share of voluntary return is rather modest – with 294,431 returnees in 2022, it accounted for 4.4% of the total population. Complementary with the data on the number of guestworkers who emigrated in the 1960s and afterwards, the majority of returnees, almost one fifth of them, returned from Germany, followed by Austria and Switzerland. The regional aspect is even more important: almost one fourth of returnees are those from ex-Yugoslav Republics (Bosnia and Herzegovina, Croatia, Montenegro, Slovenia, and North Macedonia). Every fourth returnee belongs to the elderly population, whereas the children and young people are under-represented. The majority of returnees (almost 45%) has secondary school education, while the percentage of those with primary and faculty education is almost identical (around 18%). The share of economically active returnees is under the average compared to the national population. This is in compliance with the data on their age, but also the reasons they stated for return where family ones dominate in more than half of them, whereas only 13.4% report to return for business reasons (Lukić, Lović Obradović, 2025).

On the other hand, forced return is in conjuction with the EU-Serbia Readmission agreement of 2007, a framework for the return and reintegration of Serbian citizens illegally residing in the EU.[4] Since the beginning of their implementation, a total of 25,789 returnees have been registered, with Germany, France and Austria being the main countries of return. According to the Commissariat for Refugees and Migration, 996 returnees were registered in Serbia in 2025 under the Readmission Agreement, representing a 16.3% increase compared to 2024, when

[4] On top of the EU member states, Serbian Government also signed agreements with other European countries, such as Switzerland.

839 returnees were recorded. A significant majority of the returnees in 2025 belonged to the Roma community, accounting for more than 84% of all registered returnees (CRMS 2026).

Asylum Seekers and Refugees

Like other nations in the Western Balkans, Serbia sits along a major migration corridor utilized by asylum seekers and refugees, functioning primarily as a transit zone and, to a lesser extent, a destination country. Over the past two decades, the annual volume of individuals declaring an intention to seek asylum has exhibited severe volatility, reaching an unprecedented peak of 579,518 in 2015. In recent years, despite ongoing annual fluctuations, the overall trajectory has declined sharply, with only 626 formal expressions of intent recorded in 2025. Demographic profiles throughout the 2015 – 2025 period remained consistently dominated by adult males, with Syrian and Afghan nationals representing the primary origin groups, followed by citizens of, Pakistan, Bangladesh, Iraq, and Iran. However, official declarations of intent capture only a fraction of administrative realities: across the entire period, only 4,048 individuals ultimately submitted formal asylum applications – representing just 1.1% of those who initially declared intent (CRMS, various years). Furthermore, intention data significantly undercount overall transit flows. For instance, in 2025, public authorities registered 9,567 arrivals within state-managed reception facilities, a figure that captures only accommodated populations and excludes unrecorded transit movements (AIDA, IDEAS, ECRE, 2026).

These empirical dynamics, specifically the vast disconnect between initial expressions of intent, formal asylum submissions, and total transit volumes, must be contextualised within the evolving architecture of European border governance, most notably the EU New Pact on Migration and Asylum. As the Pact mandates accelerated border screening, mandatory admissibility checks, and expanded applications of the “safe third country” concept along the EU’s external borders, transit states along the Western Balkan corridor face shifting structural pressures. Because EU member states neighboring Serbia (such as Hungary and Croatia) increasingly utilize fast-track inadmissibility procedures to reject applicants who transited non-EU territory, Serbia risks transitioning from a self-perceived, temporary transit corridor into a protracted “buffer zone” or containment space. Furthermore, external policy alignment imperatives driven by EU pre-accession requirements, joint Frontex border deployments, and mandatory visa harmonization are compelling national authorities to tighten border enforcement and expand biometric registration frameworks (Collective aid, 2026).

Consequently, while historical transit flows relied on emigration into the Schengen area, the European Union's externalized asylum management logic increasingly pressures candidate states like Serbia to absorb rejected claimants, manage return procedures, or formalize local reception structures for populations formerly in transit.

How to Understand and Implement Integration? Dilemmas in Theoretical and Policy Approaches

Integration belongs to those concepts in the migration studies which are both fundamental and controversial. It can mean "processes of interaction between migrants and the individuals and institutions of the receiving society that facilitate economic, social, cultural, and civic participation and an inclusive sense of belonging at the national and local level" (Spencer 2011, 203). Three sets of factors are seen as encouraging or discouraging for the integration: those relating to "two sides" in the process, that is the migrant and the society, as well as policy interventions (Spencer 2011). Factors relating to migrants include their characteristics, whereas factors relating to the society relate to its openness to migrants' integration and welcoming attitudes and behaviours.

Europe, and especially its Western parts, i.e. Belgium, France, Germany, Sweden, Austria, and the Netherlands, have been witnessing labour immigration, especially of low-skilled workers, ever since the 1950s, whereas policy efforts directed towards the integration were largely missing, at best until the late 1970s. The immigration was understood primarily as temporary, and from the economic and employment point of view. The EU interventions were supplementary and supportive in that regard to the national efforts, and integration was a secondary concern (Doomernik and Bruquetas-Callejo 2016; Hantrais 2007; Anderson 2015). Forced and irregular migration as of the 1990s, along with the enlargement of the EU, brought additional tensions in terms of mobility, migration, and integration, with countries designing and implementing integration policies termed as "differential exclusionist", "assimilationist" or "pluralist" (Doomernik and Bruquetas-Callejo 2016, p. 67). As of 2005, the integration obtained a more prominent place in the European Commission's agenda, when the common basic principles for immigrant integration policy were defined and reinforced in the Commission's Common Agenda for Integration. However, comprehensive approaches to integration have been still absent. One of the steps the Commission took towards this end was the adoption of the Action Plan on Integration and Inclusion 2021 – 2027, prioritizing sustainable labour market integration, but also education and training, health care and housing (European Commission 2020).

Academic critics and civil society have been calling into question the utility of the approach of integration, suggesting alternative terms, albeit without success. Integration suffers from, among other things, conceptual, political and policy challenges, all of which are relevant for the Serbian context as well. The conceptual limitations relate to its normative, abstract and prescriptive nature, resulting in capturing a little about migrants' everyday lives, and resting on the assumption they integrate only or mainly into the nation state. Political difficulties surrounding integration are mainly in the sphere of fears it provokes both in local and migrant populations. Local populations are prone to think that the policy of integration invites temporary migrants to become permanent residents, whereas migrant communities are anxious that "proper" belonging requires from them to cede their culture and the way of life. Clearly, the interactions among those two groups, which are at the heart of the integration, are characterized by unequal powers and resources. That results in activities of societies of much higher importance for the integration outcomes, whereas the "burden" of the integration is, as a rule, at the side of a migrant. The connections of the topic of integration with extremely relevant areas of societal life, such as the labour market and citizenship, show that "debates about migration are never just about migration but also about many other related public policy issues" (Palme et al. 2019, p. 242). Integration policy objectives can be contradictory and conflicting, especially from the point of view of the employment sector (domestic workers, migrant workers and employers). And finally, policy challenges belong to the sphere of defining, implementing and measuring integration and the dilemma whether the "integrated" migrant communities are ever to be "functional". Policy approaches to integration are sometimes guided by vague outcomes which are translated into rigid indicators, ignoring that some of the migrants' realities and characteristics of their situations cannot be easily observed in statistics and figures, when one-dimensionally understood and interpreted.

Public debates and narratives on integration are frequently based on inadequate data and myths, rather than facts and evidence (Ruhs et al. 2019). Despite that, they inform policy approaches to integration. One of the most distinct characteristics of the policies of integration in the countries throughout Europe is the high level of their politicization (Entzinger and Scholten 2019), within the wider politicization of migration in general in recent decades (de Haas et al. 2020). Also, the different domains of life, which are within the scope of integration, require the mainstreaming of the integration into different policies (Ruhs 2019), such as labour market, housing, health care, education, social welfare and social inclusion, anti-discrimination, etc. The "silos approach" in practice (Spencer 2011), i.e. the fragmentation of the policy process, as a result of

divided competencies of the stakeholders, leads to separation of policies and diminishes the effectiveness of the integration process.

In the societies of the Western Balkans, the absence of integration policies can also be policy – it has almost become a norm recently, when the ignorance of migrants, albeit their widespread presence, is translated into absent policies. It is here where informality plays an important role, there are "known" ways of "doing things" in the migration sector in such societies, which are not written in the regulations, but it is "common knowledge" how to do that. This, however, opens a huge space for inadequate actions. On the other hand, certain aspects of integration can be prioritized in policies, such as economic integration and certain elements of integration policies can be found fragmented in other public policies (such as policies of social cohesion and social inclusion). The implementation challenges can be an obstacle, another norm in societies of Western Balkans, which is understood as a consequence of their limited statehood per Börzel (Perisic 2018). The implementation of integration policy requires governance, consisting of an extremely dense network of national and local stakeholders, from the public, to the civil and private sectors. Migrants are rarely considered stakeholders on their own right here and their views are rarely taken into consideration. In societies of the Western Balkans, the latter can be explained within the more general approach to policy production which as a rule excludes "targeted populations". Albeit relatively high and increasing in number, labour migrants in Serbia stay largely invisible in political discourse and policy on integration. On the one hand, their recruitment has been increasingly regulated, with a notable level of privatization and outsourcing. This brings the potential of their higher vulnerability, including exploitation and abuse, and requires stricter protection mechanisms. In line with that, there is a clear need for Serbia to develop and deliver a comprehensive integration approach to current and future labour migration scenarios.

Methodology

To contextualize the empirical investigation of foreign labor migration within Serbia's evolving demographic and institutional landscape, this study is situated within a broader, mixed-methods research framework[5]. In

[5] This research is derived from the project "Integration of Migrant Workers into Local Labour Markets and Local Communities," supported by the Migration Multi-Partner Trust Fund (MPTF) and jointly implemented by the International Organization for Migration (IOM) and the Commissariat for Refugees and Migration of the Republic of Serbia (SCRM).

addition to the quantitative survey data analyzed herein, the overarching research design incorporated desk research, semi-structured stakeholder interviews, and targeted field observations. These complementary qualitative components informed the conceptual development of the investigation, supported contextual interpretation of empirical findings, and contributed to the refinement of the analytical framework. The present analysis, however, draws exclusively on the survey component of this broader research design.

The empirical analysis rests on a cross-sectional online survey administered in English to foreign labor migrants of diverse national and cultural backgrounds currently residing and working in Serbia. The research evaluates key structural and relational dimensions of integration, encompassing employment conditions, perceived social acceptance, institutional accessibility, experiences of discrimination, and subjective evaluations of life in Serbia. The central research question guiding this inquiry is: How do foreign labor migrants experience economic, social, and institutional integration within Serbia's changing socio-economic landscape?

Reflecting the dynamics outlined in the preceding chapters, the empirical findings presented in this paper reveal a distinct structural divergence between economic absorption and holistic social inclusion. While foreign workers frequently achieve a functional baseline of labor market insertion, deeper processes of institutional accessibility and social incorporation remain fragmented – constrained by linguistic barriers, uneven administrative support structures, and varying degrees of local community acceptance.

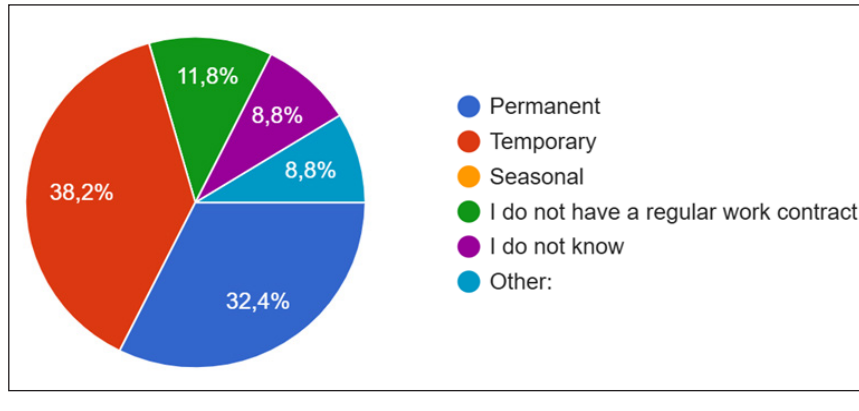
Results and Discussion

The findings presented below are interpreted through the multidimensional conceptualization of integration outlined in the theoretical framework. Following approaches developed by Spencer (2011), Penninx and Garcés-Mascareñas (2016), and Alba and Foner (2015), integration is understood not as a linear or one-dimensional process, but as a dynamic interaction between migrant workers, institutions, and the receiving society across structural, social, cultural, legal-political, and identity-related dimensions. Particular attention is therefore given to the interconnections between labour market participation, social inclusion, institutional accessibility, language acquisition, and experiences of discrimination in shaping migrant workers' everyday integration trajectories in Serbia.

The analysis further builds on critiques of integration as a normative and uneven process characterized by unequal power relations between

migrants and receiving societies. In line with this perspective, the findings demonstrate that participation in the labour market does not automatically translate into broader social inclusion, institutional security, or a stable sense of belonging. Rather, migrant workers' experiences reveal fragmented and differentiated forms of integration shaped not only by migrants' individual capacities and resources, but also by the openness of institutions, societal attitudes, and the broader governance context in society. The element of transnationalism challenges the concept of integration "as we know it", putting to the society's attention the viable transnational communities, "located in between the life-world of personal interactions, on the one hand, and the functional systems of differentiated spheres of fields, such as economy, polity, low, science, and religion, on the other hand" (Faist and Bilecen 2020, p. 500). Economic integration and labour market participation emerged as one of the central dimensions of migrant workers' experiences in Serbia.

These results correspond with theoretical arguments that labour market integration often functions as the primary and sometimes dominant dimension of integration policy, particularly in contexts where migrants are primarily approached through their economic utility. However, the results simultaneously illustrate the limitations of narrowly economistic understandings of integration, since relatively stable employment conditions frequently coexist with social exclusion, institutional insecurity, and experiences of discrimination. In the Serbian context, where labour migration governance has increasingly focused on recruitment and labour market needs, economic participation appears prioritized over broader social and civic integration mechanisms.The findings indicate relatively stable employment conditions for a considerable share of respondents. As shown in Graph 4, temporary contracts are the most prevalent employment form (38.2%), underlying a structural reliance on



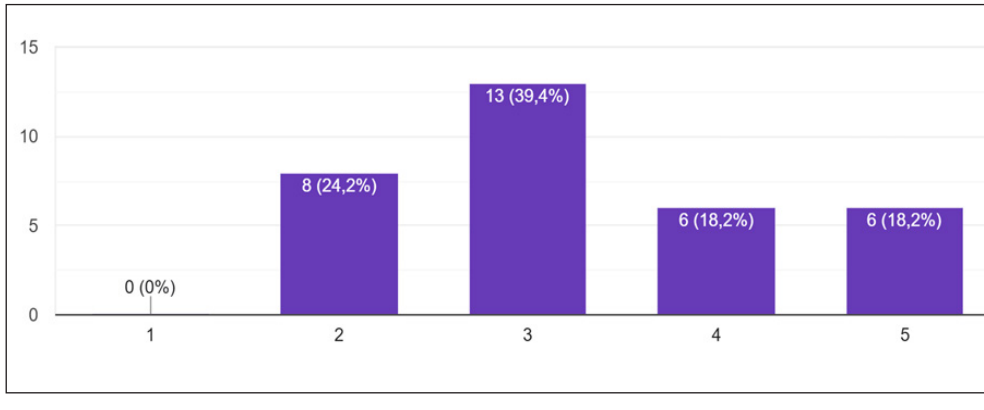
Graph 4: Types of work contracts

flexible labour. Conversely, nearly a third of respondents (32.4%) hold permanent contracts, indicating stable economic integration. However, labour precariousness is visibly present: 11.8% respondents work without a regular contract and 8.8% are unaware of their exact status, meaning one-fifth of the sample operates under legally vulnerable conditions. Most participants reported standard five-day working schedules (51.52%), whereas a smaller number indicated six-day work arrangements (18.18%). Although levels of job and salary satisfaction varied, many respondents expressed moderately positive evaluations of their employment conditions and overall labour market position.

From the perspective of structural integration, these results suggest that respondents achieve a certain level of financial and job security through participation in employment. Nevertheless, as emphasized in the theoretical framework, economic integration alone does not necessarily translate into broader forms of social inclusion, institutional security or subjective belonging.

Furthermore, the concentration of respondents within the service sector may indicate patterns of labour market segmentation, whereby migrant workers are more likely to occupy positions characterized by lower levels of stability, limited institutional protection and increased dependency on employers. Such patterns may contribute to heightened vulnerability despite formal participation in the labour market. The results support multidimensional understandings of integration by demonstrating that labour market participation may facilitate certain aspects of integration while simultaneously coexisting with vulnerabilities in social, cultural and legal-political domains.

The results support theoretical understandings of integration as a reciprocal and relational process rather than solely an individual responsibility of migrants. Respondents' experiences indicate that



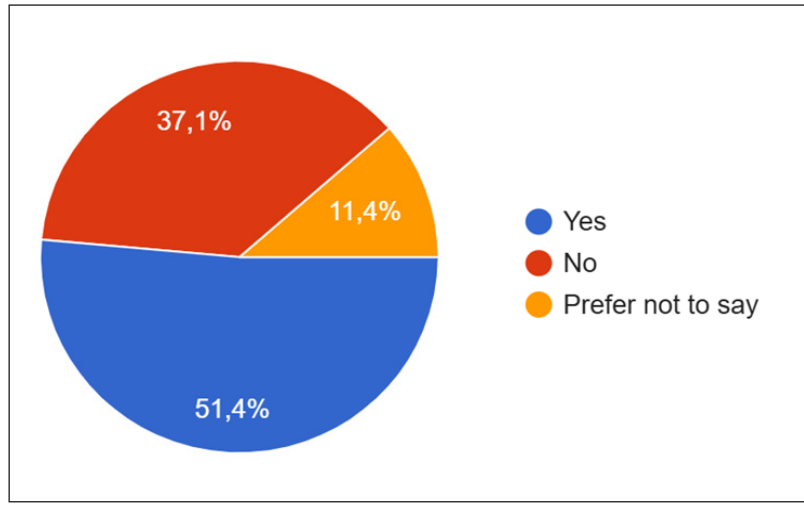
Graph 5: Feeling of being welcomed in Serbia

opportunities for social inclusion are strongly conditioned by the openness of local communities, everyday interactions, and the extent to which migrants are socially recognized as legitimate members of society. (Graph 5). These findings suggest that migrant workers frequently experience forms of functional coexistence rather than full social inclusion and participation within the receiving society. In this regard, the results correspond with theoretical approaches that distinguish structural forms of integration from broader social and identity-related dimensions of belonging.

The ability to establish meaningful social relationships appeared closely linked to language proficiency, cultural familiarity, and opportunities for everyday interaction. Respondents who reported more intensive social contact with local populations also tended to express higher levels of overall life satisfaction in Serbia.

Language emerged as one of the most significant barriers affecting multiple dimensions of integration. A considerable number of respondents identified limited proficiency in Serbian as a major obstacle influencing everyday functioning, communication with institutions, and broader social participation.

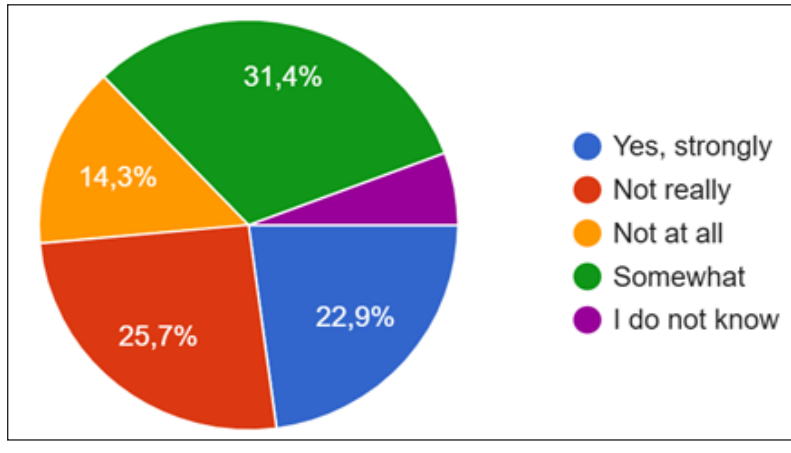
A significant number of respondents reported experiences of discrimination, exclusion, and unfair treatment across multiple settings, including workplaces, public services, restaurants, public transportation, and everyday social interactions. More than half of respondents described explicitly racialized encounters involving stereotyping, verbal humiliation and unequal treatment (Graph 6).



Graph 6: Experiences of discrimination and unfair treatment

Although the data do not indicate the existence of systematic or institutionally organized hostility, they nevertheless point to forms of everyday exclusion and conditional forms of acceptance that may adversely affect migrants' sense of belonging, psychological security, and trust in societal institutions. The findings further indicate that race, language proficiency and foreign status may intersect in shaping differentiated and, in some cases, heightened vulnerability in routine social interactions.

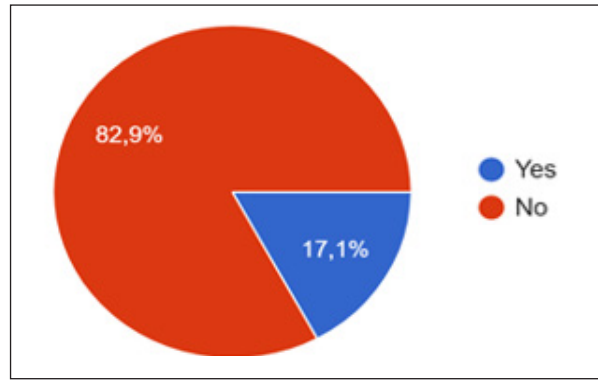
Answers to the question "How would you describe your interactions with the local people?" show nuanced realities, but can be in general described as rather modest. The biggest share of respondents, almost one third of them, reported interactions under the term "somewhat". (Graph 7).



Graph 7: Description of the frequency of interactions with local people

In this regard, the results support theoretical perspectives which emphasize that integration processes are not determined solely by migrants' individual resources or capacities, but are also fundamentally shaped by unequal social relations and the attitudes and practices of the receiving society. Respondents reported rather uniform experiences regarding access to institutional support and integration mechanisms. 82.9% of them did not report any experience, along with the limited awareness of available rights, services, and support structures.

The findings suggest that, in the Serbian context, support for migrant integration remains largely dependent on non-governmental actors, international organizations, and informal initiatives rather than on a comprehensive and systematically coordinated state-led integration framework. This observation aligns with broader scholarly accounts



Graph 8: Participation in integration programmes

highlighting fragmented governance structures and limited administrative capacities.

Furthermore, the results reflect the implications of the "silos approach", whereby fragmented institutional responsibilities and insufficient inter-sectoral coordination weaken policy effectiveness and contribute to inconsistent support provision across labour migration governance, social services, education, and anti-discrimination mechanisms.

Conclusion

Building upon these historical trajectories and contemporary shifts, recent decades have witnessed a marked increase in both the volume and complexity of overall population spatial mobility within the Republic of Serbia. This migratory trajectory was initiated in the late 1960s with the *Gastarbeiter* (guest worker) economic migration, which primarily drained low- to medium-skilled labor from agrarian, peripheral regions. This was followed by a profound qualitative and quantitative shift during the 1990s, characterized by the massive, conflict-driven emigration of highly educated youth and middle-aged professionals escaping geopolitical and economic crises in the former Yugoslavia. At the same time, Serbia experienced an influx of refugees and internally displaced persons (IDPs), which did not mitigate the negative shift in demographic characteristics. Over the past decade, emigration patterns have evolved into a complex dual stream consisting of both low-skilled structural labor migration and a highly pronounced "brain drain" of digital professionals, medical personnel, and academics. Concurrently, these outflows are increasingly counterbalanced by selective return migration particularly among retirees and returning professionals fluctuating net migration balances driven by foreign labor recruitment, and deep intra-regional

mobility linkages across the Western Balkans, where Serbia continues to serve as a key economic and educational hub.

Specifically, contemporary migration dynamics in Serbia are defined by four interconnected vectors that link national population trends with broader Western Balkan mobility networks. First, structural emigration persists as a primary driver of demographic contraction, characterized by ongoing youth-selective out-migration, medical and technical workforce depletion, and temporary circular streams to Western Europe. Second, return migration and circular oscillation have gained momentum, driven by older diaspora retirement returns alongside targeted policy incentives aimed at reintegrating highly educated professionals. Third, net migration balances continue to fluctuate, where long-term structural deficits are periodically offset by short-term spikes in foreign labor recruits, international students, and geopolitical arrivals. Finally, intra-regional Western Balkan mobility linkages remain strong, with Serbia acting as an educational and economic hub for populations from Bosnia and Herzegovina and Montenegro, a dynamic further consolidated through legal mechanisms such as the Open Balkan Initiative that streamline cross-border labor market access.

As a direct consequence of these macro-level demographic shifts and emerging labor shortages, Serbia has rapidly transitioned into a labour-importing destination. However, analyzing this shift requires moving beyond macroeconomic demand to examine how incoming migrant workers are incorporated into the host society. The empirical findings presented in this study reveal a central structural divergence between economic absorption and holistic social inclusion. A primary result is the coexistence of relatively strong labor market incorporation with weaker forms of social and institutional integration. While Serbia has created flexible administrative entry mechanisms for foreign workers, it lacks comprehensive policy frameworks addressing language acquisition, cultural orientation, family support, and long-term social inclusion for regular migrants.

These findings support theoretical critiques of economistic integration frameworks that equate employment with successful integration. In the Serbian context, labor market participation provides a baseline of structural insertion but does not extend into broader domains of social membership or institutional security. Rather than indicating successful incorporation, employment patterns reflect a segmented absorption into specific economic sectors. Foreign workers are integrated into labor demand structures rather than fully incorporated into society, reinforcing patterns observed in other emerging migration destinations.

Furthermore, the results highlight substantial heterogeneity in integration experiences, shaped by differences in national origin, educational background, and occupational positioning. That reinforces the argument

that migrant workers cannot be treated as a homogeneous category within national integration regimes. Instead, integration outcomes are stratified, displaying unequal access to resources, institutional navigation, and social inclusion. This aligns with segmented integration perspectives, which emphasize that structural positioning strongly conditions integration trajectories beyond individual agency alone.

Consequently, social integration remains limited and uneven, with most respondents reporting weak or constrained ties with the host society. The empirical data suggest that migrants frequently occupy a position of functional coexistence rather than meaningful social membership. Social inclusion appears highly conditional, shaped by language proficiency, cultural familiarity, and frequency of interaction. However, even where these conditions are met, inclusion remains unstable and context-dependent, indicating that belonging is not fully institutionalized but continuously negotiated in everyday encounters. These dynamics support relational understandings of integration, where inclusion depends not only on migrant adaptation but equally on the openness and responsiveness of receiving society structures.

Finally, the findings indicate the presence of everyday forms of discrimination and racialized exclusion across multiple social contexts. While not necessarily institutionalized within legal structures, these experiences contribute to the formation of symbolic boundaries between migrant workers and segments of the host society, presenting ongoing challenges for national social cohesion and sustainable migration governance.

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Migration and Demographic Change in North Macedonia: Economic Implications and the Risk of Secular Stagnation

Tatjana Dzambazovska,
Marica Antovska-Mitev, Taki Fiti

Introduction

Demographic change has become one of the most significant structural challenges facing European economies. Declining fertility, population ageing and persistent migration are reshaping labour markets, economic growth prospects and the sustainability of public finances. These developments are particularly pronounced in the Western Balkans, where sustained emigration since the early 1990s has accelerated demographic decline and reduced the available labour force. Large-scale migration toward the European Union (EU) and other developed economies has become a persistent feature of the region's demographic landscape, particularly among young and highly educated individuals, raising concerns about demographic sustainability and long-run economic development.

In recent economic discussions, such demographic developments are often associated with the concept of secular stagnation, which emphasizes the possibility of prolonged periods of slow economic growth resulting from structural factors such as demographic ageing, declining labour force growth, and weaker investment dynamics. These concerns are particularly relevant for small transition economies, where demographic decline and persistent outward migration reinforce existing structural constraints on labour markets and economic growth.

North Macedonia represents a typical example of these regional demographic and migration trends. Over the past decades, the country has experienced continuous outward migration, which has influenced

its demographic structure, labour market conditions, and economic performance. Outward migration has primarily been driven by better employment opportunities abroad, higher wages and improved living standards, particularly in EU member states. However, the departure of working-age individuals and skilled workers has also contributed to a gradual decline in the domestic labour force and has intensified concerns related to brain drain and human capital loss.

Migration dynamics are closely connected with declining fertility, population ageing and slowing population growth. Together, these processes characterize the current demographic transition in North Macedonia and are expected to shape its future labour market and economic performance.

The results of the 2021 Population Census reveal important changes in the age structure of the population, while population projections for the coming decades suggest a continued decline in the total population and a shrinking working-age cohort. These demographic developments are expected to reduce labour supply, constrain productivity growth, weaken long-run economic potential, and increase pressure on social protection systems.

The aim of this paper is to examine how migration and demographic transition influence labour market dynamics and long-run economic performance in North Macedonia, with particular emphasis on the potential risk of secular stagnation.

Although numerous studies have analysed migration and demographic change separately, considerably less attention has been devoted to their combined implications for labour markets, long-run economic growth and the potential risk of secular stagnation, particularly in small transition economies such as North Macedonia.

This paper contributes to the existing literature in three ways. First, it integrates migration, demographic projections and labour market analysis within a single analytical framework. Second, it links demographic developments with the concept of secular stagnation, which has received limited attention in studies on the Western Balkans. Third, it provides policy-relevant insights based on recent demographic projections and official statistical data for North Macedonia.

Given these characteristics, North Macedonia provides an appropriate case for examining how demographic change may translate into broader macroeconomic challenges.

The remainder of the paper is organised as follows. Section 2 reviews the relevant literature. Section 3 describes the data and methodology. Sections 4 to 6 present the demographic and labour market analysis, while Sections 7 and 8 discusses the broader economic implications and the potential risk of secular stagnation. The final section concludes and outlines key policy implications.

Literature Review

Migration has long been recognized as one of the key drivers of demographic and socio-economic transformation. In the Western Balkans, migration has become one of the defining structural characteristics of the region, shaping population dynamics, labour markets, and long-run development prospects. Since the early 1990s, sustained emigration towards the EU and other developed economies has significantly altered the population structure and long-run development trajectory of the Region. Within this broader regional context, North Macedonia represents a particularly relevant case due to its prolonged experience with outward migration, population ageing, and demographic decline. Compared with other Western Balkan countries, North Macedonia shares similar migration patterns characterised by persistent outward migration, population ageing and declining fertility, although the economic consequences may be proportionally greater because of its relatively small population and labour market.

A first strand of the literature focuses on migration as a structural feature of post-socialist and transition economies. In these countries, migration is often interpreted as a response to wage differentials, limited domestic employment opportunities, and expectations of higher living standards abroad (Dustmann and Frattini 2014; Docquier and Rapoport 2012). For the Western Balkans, outward migration has frequently involved young and economically active population groups, which means that migration is not only a mobility issue but also a major factor shaping the demographic structure of sending countries. Several studies emphasize that migration networks and established diaspora communities further reinforce migration flows over time (Massey et al. 1993; Castles at al. 2014). In North Macedonia, migration has been described as a long-run process influenced by economic conditions, labour market opportunities, and strong diaspora linkages (State Statistical Office 2022). Several studies also emphasize that migration from the Western Balkans has become increasingly permanent rather than temporary, contributing to sustained population decline in the countries of origin (OECD 2022; International Organisation for Migration 2022).

A second strand of the literature examines the demographic consequences of migration. Migration affects fertility behaviour, age structure, spatial population distribution, and the size of the working-age population. In countries already experiencing low fertility and population ageing, emigration may accelerate demographic decline and intensify population ageing (Lee and Mason 2010; Bloom and Finlay 2009). For North Macedonia, recent demographic evidence confirms that emigration has contributed to population ageing and the shrinking of the working-age population (State Statistical Office 2022). The results of

the 2021 Population Census reveal structural changes in the population age composition, while long-run population projections indicate that demographic ageing will continue to intensify in the coming decades. In the Western Balkan countries, these demographic effects are amplified because migration occurs simultaneously with persistently low fertility and increasing life expectancy.

Population projections represent an important analytical tool for understanding long-run demographic dynamics. According to official projections of the State Statistical Office, North Macedonia is expected to experience a gradual decline in total population under all presented scenarios up to 2070, accompanied by a strong increase in the share of older population groups. These projections also suggest a significant reduction in the working-age population, which may have important implications for labour supply and economic growth potential (State Statistical Office 2023).

Unlike many demographic studies that focus primarily on population size, this study explicitly examines the implications of projected demographic change for labour supply, long-run economic growth and the risk of secular stagnation.

A third strand of the literature addresses the relationship between migration and economic performance. The economic effects of migration are generally considered multidimensional and sometimes contradictory. Although remittances support household income, consumption and macroeconomic stability (Adams and Page 2005; World Bank 2023), these benefits do not fully compensate for the long-run loss of labour and human capital associated with sustained emigration. Consequently, the overall economic impact of migration depends on the balance between these short-run gains and the long-run structural costs for the economy. The phenomenon of brain drain has been widely discussed in the literature, especially in relation to developing and transition economies where the outflow of skilled workers may weaken innovation capacity and long-run economic development (Beine, Docquier and Rapoport 2008).

In recent years, these demographic and migration dynamics have increasingly been discussed within the broader macroeconomic framework of secular stagnation. Originally introduced by Hansen (1939) and revived in contemporary economic debates by Summers (2014), the concept of secular stagnation refers to a prolonged period of weak economic growth caused by structural factors such as demographic ageing, declining population growth, weak investment dynamics, and slower expansion of the labour force. From a macroeconomic perspective, demographic change may influence not only labour supply but also investment expectations, productivity dynamics and potential output, thereby affecting long-run economic growth. Demographic developments

play a central role in this framework because population ageing and shrinking labour supply may limit long-run growth potential (Summers 2014; Gordon 2016). Recent studies further argue that demographic ageing influences not only labour supply but also savings behaviour, investment demand and productivity growth, thereby reinforcing the structural mechanisms associated with secular stagnation (Rachel and Summers 2019).

For small transition economies such as North Macedonia, where demographic ageing coincides with persistent outward migration, these structural constraints may be considerably stronger than in larger economies. In such circumstances, migration and demographic change may reinforce structural constraints on economic growth and contribute to conditions associated with secular stagnation.

Despite the growing importance of migration and demographic change for economic development in the Western Balkans, empirical research that jointly analyses these processes remains relatively limited. Existing studies often focus either on migration patterns or on demographic trends separately. However, fewer contributions examine how migration, demographic transition and labour market dynamics interact to shape long-run economic performance, particularly within the framework of secular stagnation. This gap is especially relevant for North Macedonia, where sustained emigration and demographic ageing may significantly influence long-run development prospects. Recent regional assessments also underline that demographic decline and labour migration have become common structural challenges across the Western Balkans, requiring integrated policy responses that simultaneously address labour market shortages, human capital retention and long-run economic competitiveness (OECD 2022; World Bank 2023).

The present study contributes to this literature by integrating migration trends, demographic projections and labour market indicators within a single analytical framework. Moving beyond the traditional demographic perspective, it examines migration not only as a demographic phenomenon but also through its broader macroeconomic implications, highlighting the interaction between migration, demographic transition, labour market dynamics, and the risk of secular stagnation.

Methodology and Data

This paper adopts a descriptive and analytical research design to examine the relationship between migration, demographic transition and long-run economic performance in North Macedonia. Given the multidimensional nature of these processes, the analysis combines demographic and macroeconomic perspectives to provide an integrated

assessment of how migration, population dynamics and labour market developments interact and influence long-run growth prospects.

The empirical analysis is based primarily on official statistical data published by the State Statistical Office (SSO) of North Macedonia. The main demographic source is the 2021 Population Census, which provides comprehensive information on the size, age structure and socio-economic characteristics of the population. The census serves as the principal source for analysing the current demographic profile of the country and identifying recent demographic changes.

The study also relies on the official population projections for the period 2022 – 2070, prepared by the SSO. These projections include several demographic scenarios based on alternative assumptions regarding fertility, mortality and migration. They provide the basis for assessing future changes in population size, age composition, working-age population, and dependency ratios.

To analyse migration patterns, the study uses official migration statistics published by the SSO, including information on emigrants by destination, age, educational attainment, and reasons for migration. These data allow for an assessment of the demographic characteristics of migration and its implications for the labour market.

In addition, selected macroeconomic and labour market indicators are incorporated to evaluate the broader economic implications of demographic change. These include indicators related to labour supply, working-age population, dependency ratios, and long-run economic growth potential.

The analysis is conducted in three sequential stages. First, the paper examines the current migration profile of North Macedonia by analysing recent emigration trends, the characteristics of emigrants and the principal destination countries. Second, demographic developments are analysed using census data and long-run population projections. Particular attention is given to population ageing, changes in the age structure, the evolution of the working-age population and dependency ratios under alternative demographic scenarios. Third, the study assesses the economic implications of these demographic processes by examining their potential effects on labour supply, human capital, labour market dynamics, and long-run economic growth.

Rather than estimating econometric relationships, the paper applies a descriptive and comparative analytical approach to identify the main transmission channels through which demographic change and migration may influence macroeconomic performance.

The analytical framework is further informed by the concept of secular stagnation. This theoretical perspective is used to interpret how demographic ageing, declining labour force growth and sustained outward migration may jointly affect productivity, investment incentives and long-

run economic growth. Within this framework, migration is analysed not only as a demographic phenomenon but also as a structural factor with potentially significant macroeconomic consequences.

The analysis relies primarily on officially registered migration statistics. However, it is widely recognised that official emigration data may underestimate the true scale of migration, as many emigrants do not formally deregister their residence. Consequently, the findings should be interpreted as reflecting officially recorded migration trends rather than the full magnitude of international migration from North Macedonia. Nevertheless, the combined use of census data, demographic projections and official migration statistics provides a robust basis for analysing the long-run interaction between migration, demographic change and economic development.

Demographic Transition and Population Dynamics

North Macedonia is currently undergoing an advanced stage of demographic transition, characterised by persistently low fertility, increasing life expectancy and sustained outward migration. Together, these processes have reshaped the country's demographic structure and now represent one of the most important long-run challenges for its socio-economic development.

The demographic structure of the population is illustrated through the population pyramid based on the results of the 2021 Population Census.

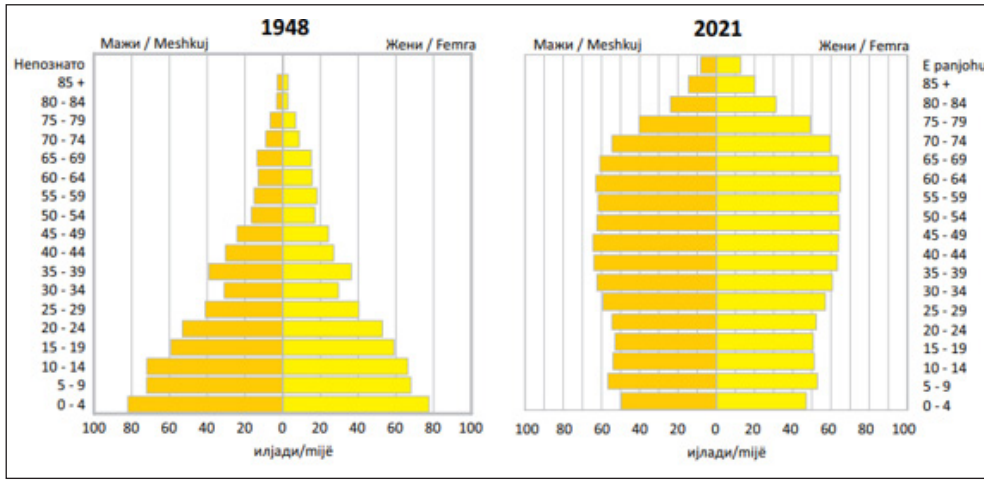


Figure 1. Population pyramids of North Macedonia, based on the 1948 and 2021 Population Censuses

Source: *State Statistical Office, 2022, pp.17.*

Compared with the population pyramid of 1948, the 2021 census reveals a clear narrowing of younger age cohorts and a substantial expansion of older age groups, reflecting the cumulative effects of demographic ageing over more than seven decades (Figure 1).

Long-run population projections further highlight the magnitude of the demographic challenge. As shown in Figure 2, all projection scenarios point to a continued decline in the total population by 2070, regardless of the assumptions regarding fertility and migration.

The most pronounced decline is observed under the low-fertility scenario, where the population is projected to decrease from 1.83 million in 2022 to approximately 1.12 million by 2070. Even under the high-fertility scenario, the population continues to decline, reaching around 1.41 million. The zero-net migration scenario produces the slowest decline, highlighting the important contribution of migration to future demographic change.

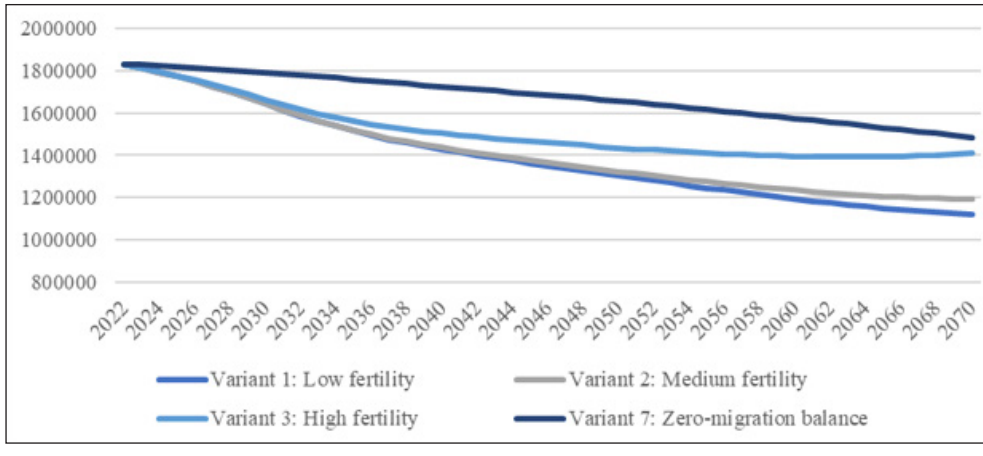


Figure 2. Total population in North Macedonia in 2022 and population projections for 2022 – 2070 by scenarios

Source: *State Statistical Office, 2023.*

This suggests that future demographic developments will increasingly be determined by structural demographic trends rather than short-term cyclical fluctuations. They suggest that improvements in fertility alone are unlikely to reverse population decline unless accompanied by substantial changes in migration patterns. Consequently, migration emerges as one of the key determinants of North Macedonia's future demographic trajectory.

These demographic trends are expected to influence not only population size but also labour availability, age dependency, human capital formation, and the long-run growth potential of the Macedonian economy.

Among the demographic drivers of these projections, migration deserves particular attention because it directly affects both the size and the age composition of the population. Against this demographic background, the following section analyses recent migration trends and their main characteristics in North Macedonia in order to better understand one of the principal drivers of future demographic change.

Emigration Trends and Drivers in North Macedonia

North Macedonia has long been characterised as a country of emigration, with outward migration substantially exceeding immigration. Although immigration exists, its scale remains relatively modest and is largely associated with family reunification, employment, education, and the return of former emigrants. Consequently, persistent negative net migration has become one of the principal drivers of demographic decline and population ageing in North Macedonia.

According to the Migration Profile of North Macedonia (2022), emigration has been a persistent feature of the country's demographic development since the second half of the twentieth century. Initially, emigration flows were largely directed toward Western European countries through labour migration programmes during the 1960s and 1970s. In more recent decades, particularly after the transition period of the 1990s and the economic restructuring that followed, emigration has intensified and diversified, involving not only temporary labour migration but also long-run and permanent migration of the population. Emigration flows from North Macedonia are strongly concentrated toward European destinations.

Although North Macedonia records both immigration and emigration flows, outward migration has consistently exceeded immigration during most of the observed period. As illustrated in Figure 3, net migration remained negative in almost every year between 2013 and 2023, confirming the country's long-standing status as a country of emigration. The only exceptions occurred in 2017 and 2018, when immigration slightly exceeded emigration, resulting in a positive migration balance. Following this temporary reversal, emigration increased substantially, particularly after 2020. The number of emigrants rose from 937 in 2020 to 2,034 in 2023, while immigration remained comparatively modest, increasing from 205 to 522 persons over the same period. Consequently, net migration deteriorated significantly, reaching its strongest negative level in 2022 (-1,534 persons). These trends indicate that immigration is currently insufficient to compensate for the continuous outflow of population, thereby reinforcing demographic decline and reducing the country's labour force potential.

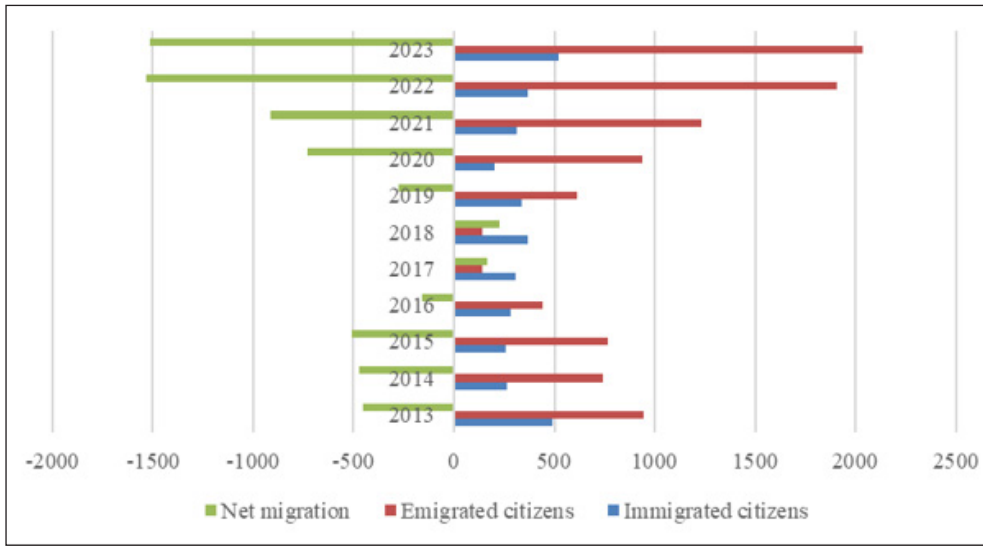


Figure 3. Immigration, emigration and net migration in North Macedonia, 2013 – 2023

Source: *State Statistical Office 2025a.*

As shown in Figure 4, the number of emigrants moving to European countries has increased significantly over the period 2014 – 2023, making Europe by far the dominant destination region for emigrants from

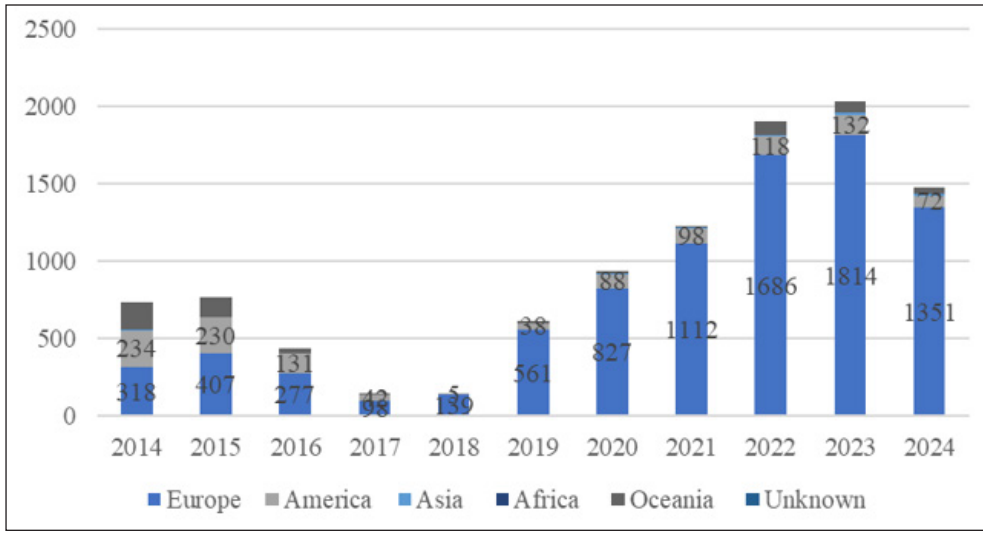


Figure 4. Destination regions of emigrants from North Macedonia abroad, 2014 – 2024

Source: *State Statistical Office 2025a.*

the country. The most common destination countries for emigrants from North Macedonia within Europe have been Germany, Switzerland, Italy, Austria, and Slovenia, reflecting established emigration networks and labour market opportunities in these economies (State Statistical Office 2025).

One of the key characteristics of contemporary emigration from North Macedonia is the high participation of young and economically active individuals. As illustrated in Figure 5, the majority of emigrants belong to the working-age population (15–64 years), which consistently accounts for the largest share of emigrants throughout the observed period. Between 2014 and 2024, this age group represented approximately 79% to 87% of total emigrants, indicating that emigration is strongly concentrated among economically active cohorts. The share of younger emigrants aged 0–14 is also limited, although it shows a moderate increase in some years, reflecting the emigration of entire families. The concentration of emigration among working-age cohorts implies that emigration affects not only population size but also the composition and productive capacity of the labour force.

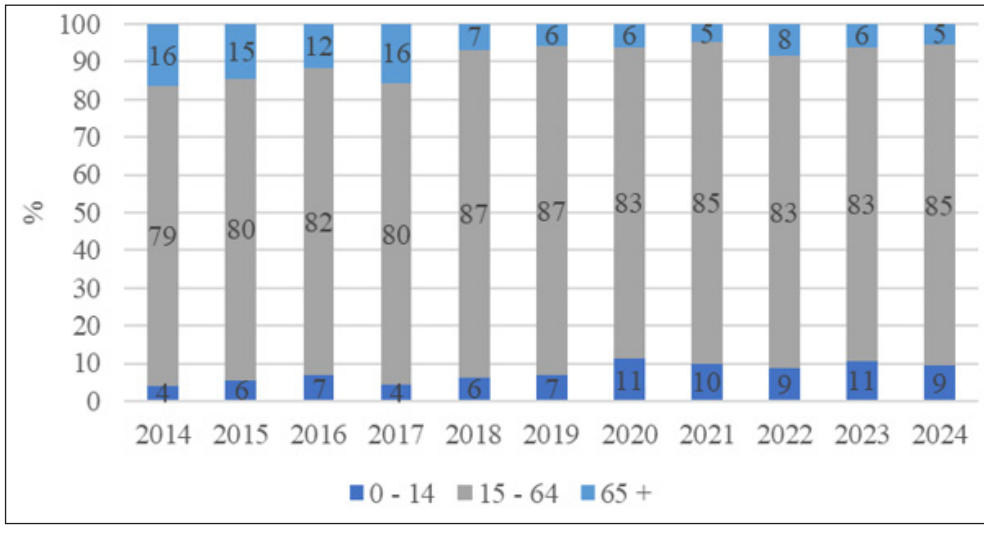


Figure 5. Emigrated citizens of North Macedonia abroad, by age groups, 2014 – 2024

Source: *State Statistical Office 2025b.*

This emigration of highly educated individuals is commonly referred to as brain drain, representing a significant challenge for countries with relatively small populations and limited labour markets, such as North Macedonia. According to international assessments, several Western Balkan countries, including North Macedonia, are among those most affected by the emigration of skilled labour (European Commission, 2020).

As illustrated in Figure 6, emigrants from North Macedonia represent diverse educational profiles, although individuals with secondary and tertiary education constitute a substantial share of total emigrants. The emigration of highly educated individuals may weaken innovation capacity, reduce the availability of specialised skills and increase labour shortages in knowledge-intensive sectors of the economy. In several years, emigrants with tertiary education account for a significant proportion of total emigration, reflecting the outflow of highly skilled labour.

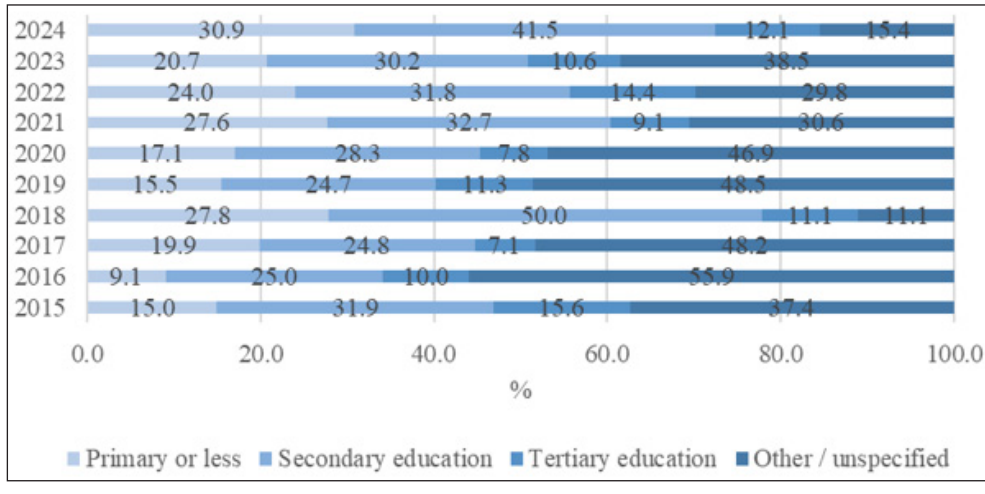


Figure 6. Emigrated citizens of North Macedonia by educated attainment, 2015 – 2024

Source: *State Statistical Office 2025c.*

Economic considerations remain the dominant drivers of emigration from North Macedonia. Differences in wages, employment opportunities, and living standards between North Macedonia and more developed European economies create strong incentives for emigration. However, due to limited data coverage, it is difficult to determine precisely the full range of motivations for emigration. According to data from the State Statistical Office, a large share of emigrants (48.4%) did not specify the reason for their stay abroad. Among the reported reasons, employment (23.7%) and family reasons (22.7%) represent the most important drivers, while marriage (3.1%) and education (1.8%) appear less frequently. The relatively high proportion of unspecified responses also highlights the limitations of officially recorded migration statistics and suggests that the actual motivations for emigration are likely to be more diverse than indicated by the available data. Nevertheless, employment-related and family-related motives clearly dominate among the reported reasons for migration.

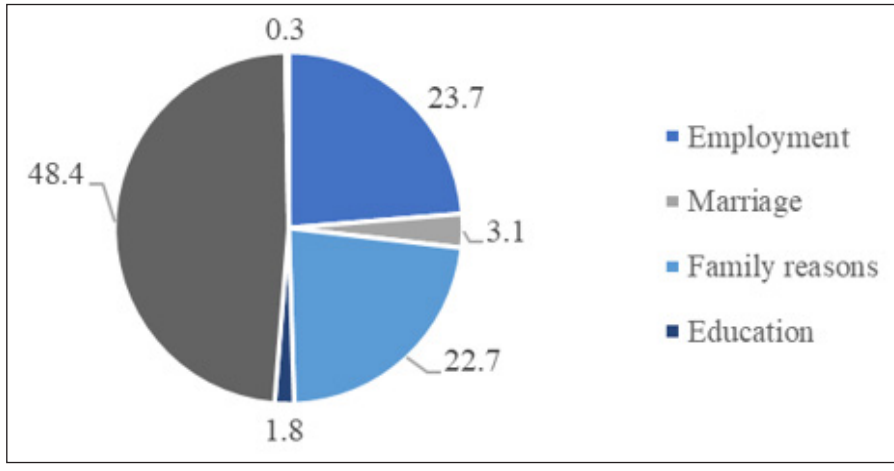


Figure 7. Reasons for emigration from North Macedonia, (%)

Source: *International Organization for Migration 2022.*

The analysis presented in this section confirms that emigration has become a persistent structural feature of North Macedonia's demographic and economic development. The continuous outflow of young, economically active and highly educated individuals not only accelerates demographic ageing but also weakens labour supply, human capital accumulation and long-run productivity growth. Consequently, migration represents not only a demographic challenge but also a structural economic issue with important implications for labour market performance, fiscal sustainability and long-run economic development. These broader macroeconomic implications are examined in the following sections through the lens of labour market dynamics, pension system pressure and secular stagnation.

Labour Market Implications of Demographic Change

Demographic change represents one of the most significant structural challenges for the labour market in North Macedonia. Declining fertility rates, population ageing, and sustained emigration have gradually reshaped the demographic structure of the population, contributing to a steady contraction of the working-age population and increasing pressure on labour market dynamics.

Population projections indicate that North Macedonia is likely to experience a substantial decline in its working-age population over the coming decades. As illustrated in Figure 8, the number of individuals aged 15–64 is projected to decrease from approximately 1.2 million in

2022 to between 640 thousand and 804 thousand by 2070, depending on the demographic scenario considered. Even under relatively favourable assumptions, such as higher fertility rates, the projections still indicate a pronounced reduction in the potential labour force.

Under the low fertility scenario, the working-age population is projected to decline to around 640 thousand by 2070, representing a reduction of nearly 47% compared to 2022. Similar trajectories are observed under the medium and constant fertility scenarios, confirming the robustness of the projected decline. Only the scenario assuming zero migration balance suggests a relatively less pronounced contraction, with the working-age population reaching around 822 thousand by the end of the projection period.

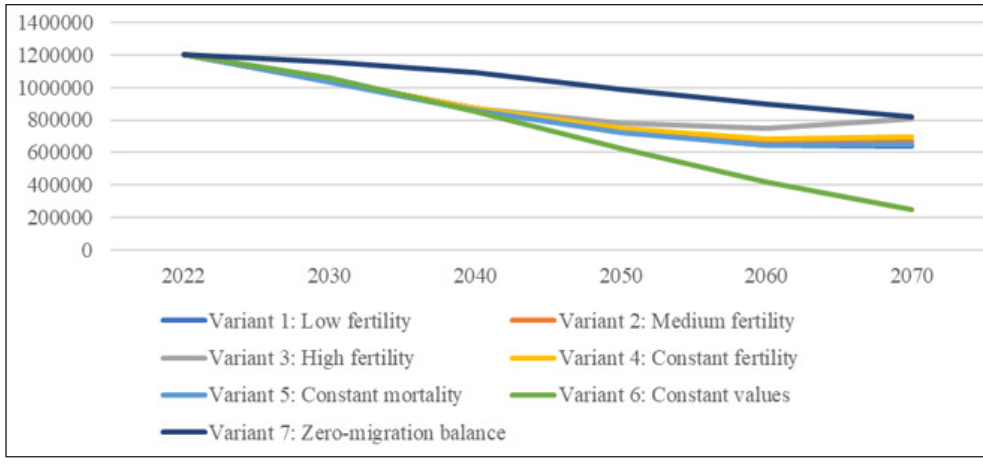


Figure 8. Projected working-age population (15 – 64) in North Macedonia under different demographic scenarios, 2022 – 2070 (selected years)

Source: *State Statistical Office 2023.*

The projected decline in the working-age population suggests that labour supply will become increasingly constrained over time. Unless compensated by higher labour force participation, technological progress or immigration, employers may face growing difficulties in recruiting workers, particularly in sectors already experiencing labour shortages.

These demographic developments are broadly consistent with trends observed in many countries of Central, Eastern, and South-Eastern Europe, where declining fertility, population ageing, and outward migration have significantly affected labour supply dynamics. However, due to its relatively small population and persistent emigration trends, the impact of demographic decline may be particularly pronounced in the case of North Macedonia.

While the absolute number of working-age individuals is projected to decline substantially, demographic projections also indicate a gradual reduction in their relative share within the total population. As shown in Figure 9, the working-age population accounted for approximately 65.7% of the total population in 2022, but this share is projected to decline across most demographic scenarios over the coming decades. Under the low fertility scenario, the share could fall to 53.8% by 2060, while similar downward trends are observed under the medium and high fertility variants. These projections reflect the ongoing ageing of the population and indicate that the economically active population will represent a progressively smaller proportion of the total population.

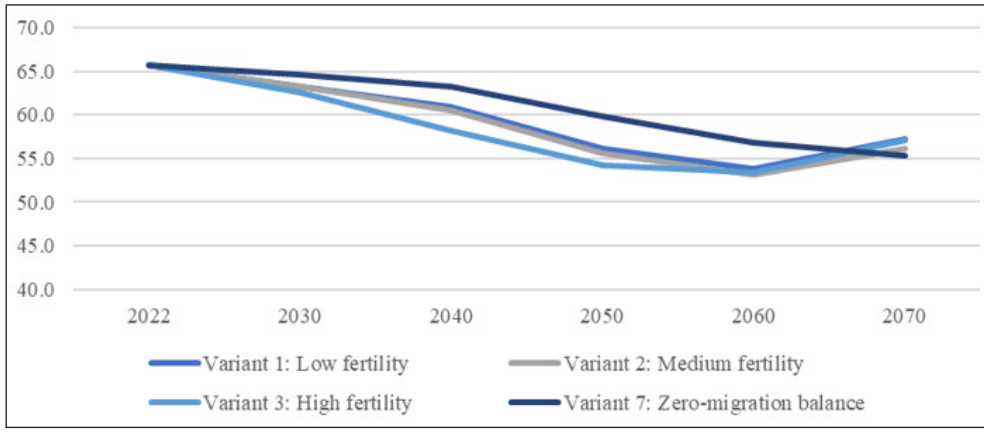


Figure 9. Projected share (%) of working-age population in total population in North Macedonia, 2022 – 2070 (selected years)

Source: *State Statistical Office 2023.*

Together, these projections indicate that future labour market challenges will arise not only from a declining number of workers but also from an increasingly unfavourable demographic structure, reducing the pool of economically active individuals available to support economic activity.

The declining share of the working-age population implies that a progressively smaller proportion of the population will participate in economic activity. This demographic shift is likely to increase competition for labour and encourage firms to invest more in automation, digitalisation and skills development.

While the projected decline in the working-age population already suggests a contraction of labour supply, the implications become even more evident when considering the old-age dependency ratio. As the number of individuals aged 15–64 declines and the elderly population

increases, demographic dependency is projected to rise substantially across all scenarios (Figure 10). Under the low fertility scenario, the ratio increases from 1.03 in 2022 to 3.17 by 2070, whereas under the high-fertility scenario it reaches 1.52, indicating that population ageing remains significant even under more favourable demographic assumptions. The medium-fertility scenario projects a ratio of 2.31 by 2070, while the zero-migration balance scenario records a value of 2.46, illustrating that reduced emigration moderates, but does not reverse, the ageing process.

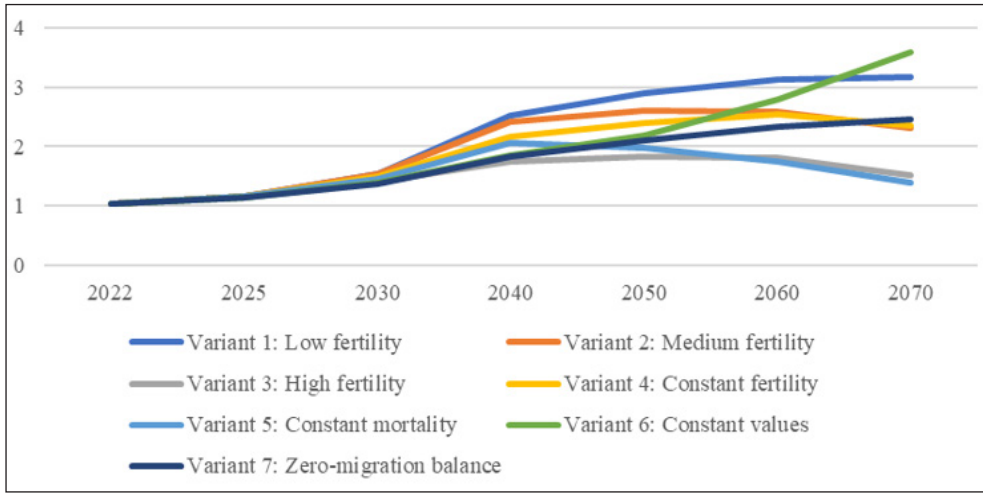


Figure 10. Projected old-age dependency ratio in North Macedonia under alternative demographic scenarios, 2022 – 2070 (selected years)

Source: *State Statistical Office 2023.*

Together, the decline in both the absolute number and the relative share of the working-age population suggests that future labour market challenges will stem not only from fewer workers, but also from a progressively less favourable demographic structure.

Demographic change is likely to influence the size of the labour force and also its composition, sectoral distribution and skill structure. As labour supply declines, employers may increasingly face recruitment difficulties, particularly in sectors requiring specialised skills or manual labour. At the same time, population ageing is likely to increase the share of older workers, reinforcing the need for lifelong learning, reskilling and greater labour market flexibility.

These developments may require significant labour market adjustments. In particular, policies aimed at increasing labour force participation among underutilized population groups, including women, older workers, and young people, may become increasingly important.

In addition, improvements in education, skills development, and technological adoption could play a key role in compensating for the decline in labour supply.

Better management of migration, including the retention of skilled workers and the attraction of return migrants, may help alleviate future labour market pressures.

Demographic change is expected to reshape the labour market in North Macedonia through a declining labour supply, an ageing workforce and increasing labour shortages. These developments highlight the need for policies aimed at increasing labour force participation, improving workforce skills, extending working life and enhancing labour productivity. The broader macroeconomic implications of these labour market trends are examined in the following section.

Pension System Sustainability and Ageing Pressures

The demographic trends analysed in the previous sections have important implications for the sustainability of public finances and social protection systems. Among these, ensuring the long-run sustainability of the pension system represents one of the most immediate fiscal challenges facing North Macedonia.

One of the most significant long-run consequences of demographic ageing in North Macedonia concerns the sustainability of the pension system. North Macedonia operates a three-pillar pension system consisting of: (i) a pay-as-you-go public pension scheme based on intergenerational solidarity; (ii) a mandatory funded second pillar; and (iii) a voluntary funded third pillar.

The share of the population aged 65 and above exceeded 17% in 2021, and official demographic projections indicate a further substantial increase in the coming decades. As the number of pensioners continues to rise while the active labour force gradually declines, the financial balance of the pay-as-you-go pillar has remained negative for many years. This has required growing transfers from the central government budget to the Pension and Disability Insurance Fund in order to ensure regular pension payments.

As illustrated in Figure 11, budget transfers from the central government have increased considerably over the last decade. This trend reflects the widening gap between pension expenditures and contribution revenues and illustrates the growing fiscal burden associated with demographic ageing.

During the period 2014 – 2024, transfers from the central budget accounted on average for around 39% of total revenues of the first pension pillar. In 2024, such transfers reached approximately EUR 690

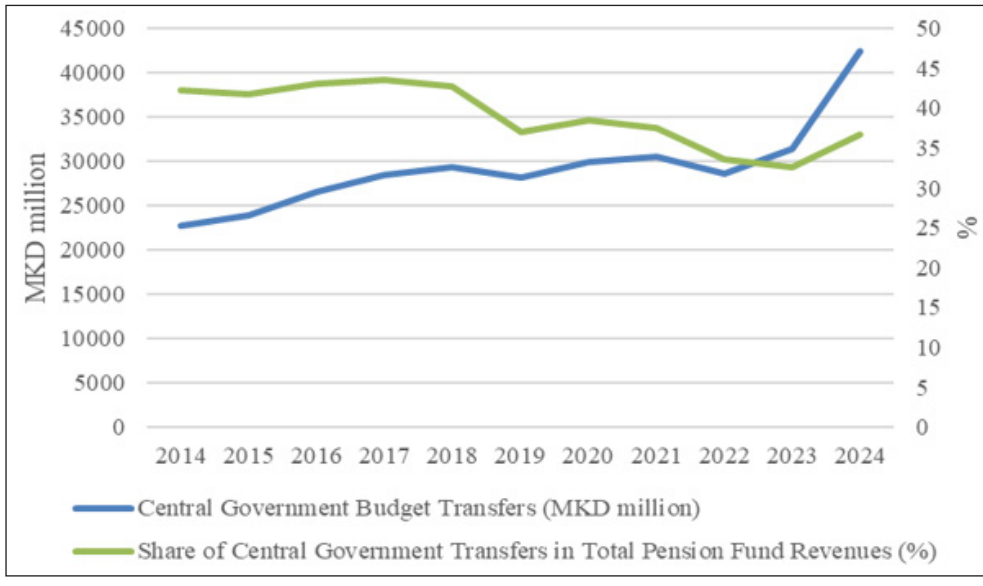


Figure 11. Central Government Budget Transfers to the Pension and Disability Insurance Fund (MKD million) and their share in Total Fund Revenues (%), 2014 – 2024

Source: *State Audit Office 2026.*

million. Following several discretionary pensions increases during 2014 and 2024, budget transfers exceeded EUR 800 million in 2025, while projections for 2026 suggest that they may surpass EUR 1 billion (State Audit Office 2026).

At the same time, the ratio of contributors to pensioners has deteriorated markedly – from 1.86 in 2016 to 1.64 in 2024 (Figure 12). Long-run projections suggest a further decline toward nearly one contributor per pensioner in the coming decades. This trend reflects both demographic ageing and the gradual contraction of the active labour force, reducing the contribution base that finances the public pension system.

The declining contributors-to-pensioners ratio implies that each employed person is required to finance an increasing share of pension expenditures. In the absence of demographic recovery or higher labour force participation, this trend is expected to intensify fiscal pressures over the long run. Consequently, the financial sustainability of the pay-as-you-go scheme becomes increasingly dependent on budget support and future labour market developments.

Addressing these challenges will require a combination of pension reforms and broader labour market measures. At the same time, labour market and demographic policies should focus on increasing labour force participation, promoting active ageing, improving labour

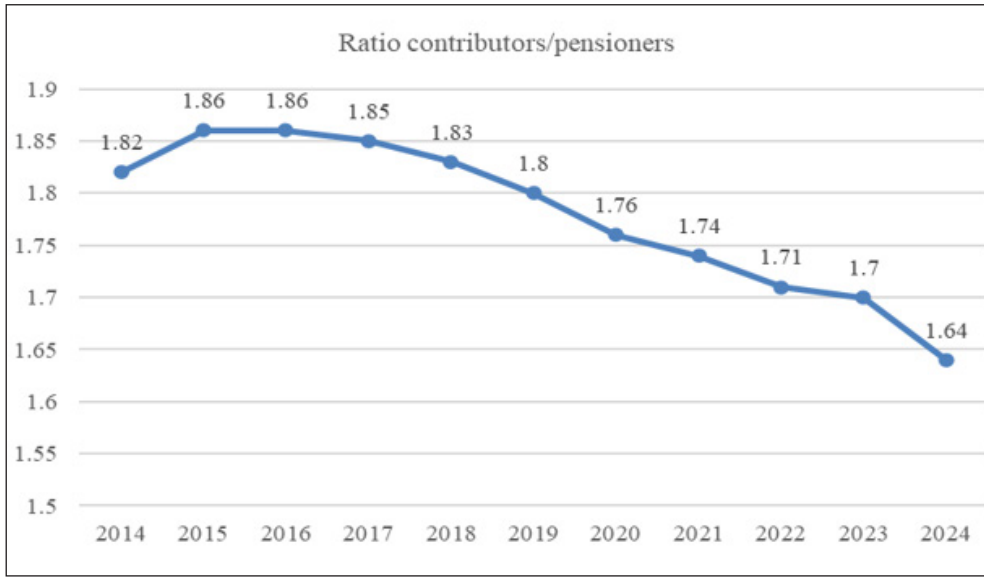


Figure 12. Ration of Contributors to Pensioners in North Macedonia, 2014 – 2024

Source: *State Audit Office 2026.*

productivity, encouraging private pension savings, supporting fertility, and encouraging return migration in order to strengthen the contribution base over the long-run.

Demographic ageing is expected to place increasing pressure on the financial sustainability of North Macedonia's pension system through a declining contributors-to-pensioners ratio and rising pension expenditures. Without timely reforms, the need for growing budget transfers may continue to increase over the coming decades. Ensuring long-run sustainability will therefore require a combination of pension reforms, labour market measures and demographic policies. The broader macroeconomic implications of these fiscal pressures are discussed in the following section.

Economic Implications and Risk of Secular Stagnation

The findings presented in the previous sections indicate that demographic decline is likely to become one of the principal structural constraints on North Macedonia's long-run economic development. Rather than affecting only population dynamics, demographic change influences the economy through several interconnected channels that simultaneously weaken labour supply, productivity, investment, and public finances.

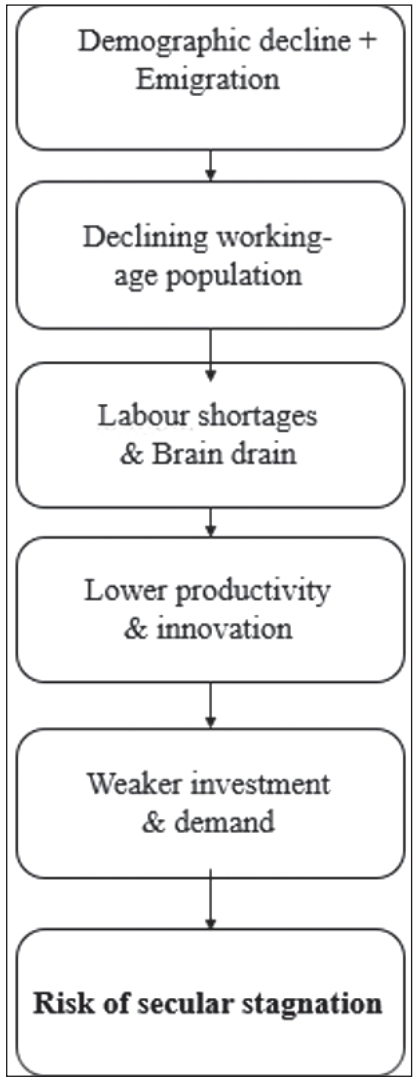


Figure 13. Transmission Mechanism from Demographic Decline to the Risk of Secular Stagnation

Source: *Authors' own elaboration.*

Figure 13 summarises the main transmission channels through which demographic decline may affect long-run economic performance. Rather than operating independently, these mechanisms reinforce one another. A shrinking and ageing population reduces labour supply, intensifies labour shortages, weakens human capital accumulation and productivity growth, increases fiscal pressures, and ultimately lowers the economy's long-run growth potential.

Appropriate structural reforms aimed at increasing productivity, strengthening human capital, improving institutional quality, and promoting innovation could mitigate the adverse effects of demographic decline. For North Macedonia, the challenge is therefore not only demographic, but also one of economic transformation and policy adaptation. As discussed in previous section, the working-age population (15–64 years) is projected to decline substantially under all demographic scenarios. Even under the high-fertility scenario, the working-age population is projected to decline substantially by 2070, indicating that demographic pressures persist even under relatively favourable demographic assumptions. A smaller labour force may constrain the productive capacity of the economy, reduce labour availability across sectors, and limit the potential for output expansion. For a relatively small economy such as North Macedonia, where labour market is already narrow and emigration remains persistent, these effects may be particularly pronounced.

The decline in labour supply is likely to be accompanied by increasing structural labour shortages. In recent years, employers in North Macedonia have reported growing difficulties in recruiting workers

in sectors such as construction, manufacturing, transport, healthcare, and hospitality. These shortages are partly cyclical, but demographic factors are becoming increasingly important. Continued emigration of young workers, combined with ageing of the domestic workforce, may intensify labour scarcity and place upward pressure on wages without a corresponding increase in productivity. In such circumstances, firms may face difficulties expanding production, while some labour-intensive sectors may lose competitiveness.

Another important channel concerns human capital and productivity growth. Emigration from North Macedonia is concentrated among young and economically active individuals, while a considerable share of emigrants possesses secondary or tertiary education, as discussed in previous section. This suggests that emigration may involve not only a quantitative loss of labour, but also a qualitative loss of skills and competencies. For smaller economies, the emigration of engineers, medical staff, IT professionals, and other skilled workers may have disproportionate long-run effects. It may weaken innovation capacity, slow technological adoption, and reduce entrepreneurial dynamism. In the absence of sufficient domestic replacement through education or return migration, these processes may lower long-run productivity growth.

Demographic ageing also has significant fiscal implications. The evidence presented above indicates that the old-age dependency ratio is projected to rise substantially over the coming decades across all scenarios. This means that a progressively smaller working-age population will need to support a growing number of pensioners and elderly citizens. Such trends may place increasing pressure on pension systems, healthcare expenditure, and broader public finances. In countries with pay-as-you-go pension arrangements, demographic ageing may require either higher contribution rates, later retirement ages, increased budget transfers, or structural pension reforms.

From a macroeconomic perspective, these developments may interact in ways that weaken long-run growth dynamics. A shrinking labour force reduces potential output growth. Slower labour force expansion may also lower expected returns on investment, thereby reducing incentives for private capital formation. At the same time, weaker population growth and ageing may dampen domestic demand, particularly in housing, consumer durables, and other investment-sensitive sectors. If productivity growth also remains modest, the combined effect may be a prolonged period of subdued economic expansion.

These mechanisms are closely related to the concept of secular stagnation. Originally associated with Hansen (1939) and revived in modern debates by Summers (2014), secular stagnation refers to a persistent tendency toward low growth, weak investment demand, and insufficient dynamism driven by structural rather than cyclical factors. In

the case of North Macedonia, demographic decline, outward migration, labour force contraction, and ageing may reinforce exactly such structural constraints. The country may therefore face not merely temporary slowdowns, but a gradual weakening of long-run growth potential if current trends persist.

This does not imply that secular stagnation is inevitable. Policy choices can significantly influence outcomes. Raising labour force participation among women, youth, and older workers could partially offset labour shortages. Productivity-enhancing reforms, such as digitalization, technological upgrading, education quality improvements, and stronger institutions, could help sustain growth despite demographic decline. Policies encouraging return migration, diaspora investment, and retention of skilled workers may also be particularly relevant for North Macedonia.

Appropriate structural reforms aimed at increasing productivity, strengthening human capital, improving institutional quality and promoting innovation could mitigate the adverse effects of demographic decline. Ultimately, the future growth trajectory of North Macedonia will depend not only on demographic developments themselves, but also on the country's ability to adapt through higher productivity, stronger institutions and more effective labour market and innovation policies.

Conclusion

This paper examined the interaction between migration, demographic ageing, and long-run economic performance in North Macedonia. Drawing on the 2021 Population Census, official population projections to 2070, and selected migration indicators confirms that the country is entering a period of pronounced demographic transformation characterized by declining population size, a shrinking working-age cohort, and a steadily rising share of elderly population groups. These trends are further intensified by persistent outward migration, particularly among young and economically active individuals.

The findings suggest that migration has become not only a demographic issue but also a structural economic challenge. The continued emigration of labour force participants and skilled workers reduces labour supply, weakens the domestic human capital base, and may constrain productivity growth and innovation capacity. At the same time, population ageing increases old-age dependency ratios and creates growing pressures on pension systems, healthcare expenditure, and broader public finances. In this context, demographic change affects both the supply side and the fiscal foundations of the economy.

By integrating demographic projections, migration trends and labour market analysis within the framework of secular stagnation, this study demonstrates that demographic change should be understood not only as a population issue but also as a long-run macroeconomic challenge. Together migration, population ageing and labour force contraction reinforce one another, creating structural constraints that may gradually weaken North Macedonia's long-run growth potential.

The paper further argued that these developments may be interpreted through the lens of secular stagnation. A smaller labour force, slower population growth, weaker domestic demand, and lower incentives for private investment may gradually reduce the country's economic dynamism. For small open economies such as North Macedonia, where demographic decline coincides with sustained emigration, these risks may be more pronounced than in larger economies.

However, demographic decline does not automatically imply economic stagnation. International experience suggests that its adverse effects can be mitigated through coherent migration, labour market and diaspora policies. Comparative evidence from European and Western Balkan countries indicates that successful approaches rely on effective institutions, policy coordination, reliable migration data, local engagement, and measures that promote circular migration, diaspora investment and knowledge transfer. In this regard, North Macedonia could benefit from moving from a fragmented migration approach towards a strategic framework that integrates migration policy into broader economic development objectives.

From a policy perspective priorities should include raising labour force participation among women, youth, and older workers; improving productivity through education, digitalisation, and innovation; strengthening the sustainability of the pension system; reducing barriers for return migration; and creating institutional mechanisms for mobilising diaspora capital and expertise. In addition, municipalities should play a stronger role in reintegration and investment attraction, given that the local level often experiences the most direct effects of migration.

Ultimately, demographic decline is likely to affect not only current economic performance but also the country's long-run potential growth through lower labour supply, weaker productivity dynamics and increasing fiscal pressures.

Overall, the future challenge for North Macedonia is not only how to respond to population decline, but how to maintain dynamic and inclusive economic growth under conditions of demographic ageing and continued migration pressures. Whether North Macedonia moves towards a path of secular stagnation or succeeds in maintaining sustainable long-run growth will depend not only on future demographic trends, but also

on its ability to improve productivity, strengthen institutions, mobilise human capital, and implement timely structural reforms. In this sense, demographic policy should be regarded not merely as a social policy concern, but as an integral component of the country's long-run economic development strategy.

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Beyond Mass Emigration: Albania's Changing Migration Landscape and the Development Dilemma

Ilir Gëdeshi

Introduction

Nearly 36 years after the beginning of the post-socialist transition, international migration and its economic, political and social consequences remain among the most fundamental, indeed existential, issues in Albania. According to the World Bank, Albania ranks among the leading countries worldwide in terms of the intensity and scale of emigration relative to its population (World Bank, 2016).

So how many Albanians have emigrated since the beginning of the post-socialist transition? In the absence of a comprehensive register of emigrants, an exact answer is difficult to obtain. Nevertheless, two main domestic sources can be identified. The first consists of INSTAT population censuses (1989, 2001, 2011, 2023). Using the 'census residual' method, which estimates emigration as the difference between two censuses net of natural population change, about 1.6 million people emigrated from Albania between 1989 and 2024. This estimate excludes children born abroad to emigrants, who constitute the 'second generation' and form part of the 'new Albanian diaspora'.

The second source is the Civil Status Register, which records Albanian citizens residing inside and outside the country, including children born abroad and registered in Albania. As of 1 January 2025, the register included 4.7 million citizens (Zaloshnja, 2025), compared to a resident population of 2.36 million (INSTAT, 2025a). The difference provides an approximate estimate of the 'new Albanian diaspora': 2.34 million people, or 49.8% of all Albanian citizens. This estimate, however, excludes those who have lost Albanian citizenship and those born abroad who have not been registered, including some children with dual citizenship.

Despite being dispersed across dozens of countries, Albanian emigration remains concentrated in five main destinations: Italy (557,000), Greece (425,000), the USA (206,000), Germany (109,000) and the UK (68,000) (INSTAT, 2025b). Particularly after the global financial crisis, however, a gradual shift has occurred from traditional destinations (Greece and Italy) towards other Western European countries and the US, reflecting changes in both migrant profiles and migration channels.

These demographic changes are closely linked to internal population movements. Albania is a country in motion (Vullnetari, 2012), where internal and international migration are closely intertwined and mutually reinforcing. Some individuals migrate internally before moving abroad, depending on accumulated financial and social capital; others emigrate first and finance their families' internal migration through remittances, while some return migrants relocate to different areas of the country (de Soto et al., 2002; Vullnetari, 2012; Caro et al., 2014). Internal migration has profoundly reshaped the territorial distribution of the population, depopulating mountainous and rural areas and concentrating people in urban centres, particularly Tirana and Durrës, and along the western coast.

Throughout the post-socialist transition, Albanian emigration has been a dynamic process, with its intensity and characteristics varying across four decades, albeit without clear dividing lines between them.

In the first decade, the 1990s, Albanian emigration reached extremely high levels, with spontaneous and unregulated flows consisting mainly of young men migrating to Greece and Italy in search of work and to escape poverty. Toward the end of the decade, regularization schemes – first in Italy and later in Greece – allowed many emigrants to legalize their status and subsequently reunite with their families.

The second decade was characterized by the maturation of the migration cycle, with legalization followed by family reunification, integration and improvements in emigrants' economic and social status. Migration continued at a lower intensity and primarily through legal channels, while destinations gradually diversified beyond Greece and Italy to include other European countries, particularly the UK, and North America (King, 2003).

The third decade was characterized by a renewed increase in emigration and further diversification of destinations, including Germany, France and Belgium. Return migration peaked twice, in 2010–2013 (Greek financial crisis) and 2016–2017 (return of rejected asylum seekers from Germany). Albania also became a transit country for refugee flows towards the EU (Council of Ministers, 2018). Despite these overlapping migration flows, emigration remained dominant, while an increasing share of emigrants had tertiary education, making brain drain a defining feature of this decade.

The fourth decade of emigration is characterized by a deepening of previous trends and increasing immigration to Albania, driven by demographic contraction and labour shortages. According to INSTAT (2025c), around 22,000 immigrants were registered in 2024, compared to 15,000 in 2021. Nevertheless, Albania remains far from completing a transition from a country of net emigration to one of net immigration (King and Gëdeshi, 2020).

Consequently, Albanian emigration has evolved from a massive, spontaneous, survival-driven phenomenon into an increasingly selective and structural process which, through changes in the demographic base and human capital, is becoming a constraining factor for the country's long-term development. This transformation reflects both internal pressures generated by Albania's economic, social and institutional structures, operating on an increasingly narrow demographic base, and global and European-level changes reshaping migration opportunities, directions and profiles.

Four questions arise from this discussion, which this paper seeks to address:

1. How are migration flows from Albania likely to evolve if internal and external conditions remain unchanged?
2. How has the demographic and socio-economic profile of Albanian migration changed?
3. What are the likely impacts of youth migration and brain drain on Albania's economy and society?
4. What policies could mitigate the negative effects of youth brain drain while harnessing the opportunities of migration through return, circular migration and diaspora engagement?

Methodology

This paper is based on the analysis of primary and secondary data, combining a review of the existing literature on migration in Albania and the Western Balkans with the analysis of quantitative survey data.

The literature review draws on scientific publications, institutional reports and studies by international organizations, as well as official statistics published by the Albanian Institute of Statistics (INSTAT).

The quantitative analysis draws on data from five surveys conducted by the Center for Economic and Social Studies (CESS) over recent years. These surveys focused on potential migration (1,421 respondents across all regions of Albania); brain drain and the formation of what we call the 'new Albanian scientific diaspora' (725 Albanian citizens pursuing or holding a PhD abroad); student migration (651 Albanian students

abroad); and the migration of medical doctors (301 Albanian doctors abroad and 731 doctors practising in Albania), the latter representing a specific and strategic segment of brain drain. Together, these surveys provide an empirical basis for analysing youth migration, brain drain and the potential for return and diaspora engagement.

As the surveys cover different population groups and periods, their findings are used to identify complementary dimensions of Albanian migration rather than to establish directly comparable estimates across groups.

Future Migration Flows

The first question concerns the future of migration flows from Albania, assuming that internal and external conditions remain unchanged. Emigration remains high, exceeding 40,000 people annually in recent years, according to INSTAT data.[1] However, the answer for future trends is complex and ambivalent.

On the one hand, potential emigration – the intention or desire to migrate – remains high. Surveys by national and international organizations consistently rank Albania among the countries with the highest levels of potential emigration. According to the Regional Cooperation Council (RCC), between 2021 and 2023, potential emigration fluctuated between 42% and 49%, placing Albania second in the Western Balkans after Kosovo (Regional Cooperation Council, 2021, 2022, 2024). Similarly, a Friedrich-Ebert Foundation survey found that 35.5% of Albanian youth expressed a strong or very strong desire to emigrate (Cela et al., 2024). These findings suggest that emigration, particularly among young Albanians, is likely to continue in the coming years.

On the other hand, sustained emigration over the past 35 years, limited return migration and persistently low fertility have contributed to population decline, particularly among younger cohorts. Between the 2011 and 2023 censuses, the share of the population aged 15–29 fell from 25.2% to 17.9%, a decrease of 7.3 percentage points.[2] Consequently, despite persistently high intentions to emigrate, Albania's demographic capacity to generate future emigration flows is likely to diminish.

[1] https://databaza.instat.gov.al:8083/pxweb/sq/DST/START__MM/EM_01/

[2] https://www.instat.gov.al/sq/temat/censet/censet-e-popullsise-dhe-banesave/#tab2

Changing characteristics and drivers of migration

The characteristics and drivers of Albanian emigration have changed significantly over the past four decades, reflecting socio-economic and political transformations both within Albania and internationally. A major turning point followed the global financial crisis, when traditional migration channels towards Greece and Italy began to narrow, while new opportunities emerged in Germany, other Western European countries and the US. This shift reflects changes not only in destinations but also in the motivations and socio-demographic profiles of Albanian emigrants.

A 2018 CESS survey on potential migration, compared with a similar survey conducted in 2006/2007, showed that economic factors remained the main drivers of Albanian emigration, although their relative importance had declined (Gëdeshi and King, 2018; King and Gëdeshi, 2020). Meanwhile, the importance of educational factors, both for migrants and their children, more than doubled, while other factors, particularly the perception that 'there is no future in Albania', also increased significantly (Table 1).

Table 1. Main Reasons for Potential Emigration from Albania, 2007 and 2018

No.	Reasons for leaving Albania	2007 (%)	2018 (%)	Change (pp)
I	**Economic factors**	**65.8**	**57.0**	**−8.8**
1	To improve standard of living	35.7	30.9	−4.8
2	Have no job/cannot find a job	19.7	18.3	−1.4
3	Nature of work unsatisfactory	9.3	6.1	−3.2
4	Inadequate social security system	0.0	1.3	+1.3
5	To repay debts	0.2	0.4	+0.2
II	**Education**	**8.1**	**17.4**	**+9.3**
1	To obtain education	5.4	5.4	0.0
2	To finance children's education	2.7	12.0	+9.3
III	**Family reasons**	**11.2**	**4.6**	**−6.6**
1	To accompany/follow spouse/parent	10.2	3.5	−6.7
2	To get married/just married	0.5	0.8	+0.3
3	To escape from family problems	0.5	0.3	−0.2
IV	**Health**	**1.1**	**1.5**	**+0.4**
1	To receive necessary health care	1.1	1.5	+0.4
V	**Other reasons**	**13.8**	**19.4**	**+5.6**
1	No future here in Albania	2.9	10.8	+7.9
2	Want to go abroad	2.7	2.6	−0.1

Source: Gëdeshi and King (2018), New Trends in Potential Migration from Albania, Table 11, p. 63 (CESS survey data).

Notes: Changes are expressed in percentage points (2018 minus 2007). Selected subcategories are presented; therefore, their percentages do not necessarily sum to the category totals.

During the first two decades of the transition, poverty and unemployment dominated migration motives, with emigration often functioning as a survival mechanism (de Soto et al., 2002). Today, although poverty persists, emigration increasingly reflects aspirations for higher living standards, better educational and professional opportunities, and greater long-term security, marking a gradual shift from survival migration towards migration for socio-economic advancement.

The structure of the Albanian economy, dominated by low-productivity and low-wage sectors, encourages the emigration of educated and skilled young people. The mismatch between their qualifications and labour market opportunities limits their prospects for professional integration and increases their propensity to emigrate.

Emigration is increasingly driven by multiple interacting factors. Educational aspirations include students seeking better university education abroad, young doctors pursuing specialized training and parents seeking better educational opportunities for their children. According to the potential migration surveys, the perceived lack of future prospects in Albania constitutes the third most important driver of emigration. Qualitative interviews associate this perception with corruption, the lack of meritocracy and transparency, low trust in institutions, and inadequate public services and infrastructure.

The 2018 CESS survey on potential migration also revealed a shift in intended destinations from traditional host countries, particularly Greece and Italy, towards Germany and the US (Gëdeshi and King, 2018; King and Gëdeshi, 2020). This reflects the geographical diversification and restructuring of Albanian emigration.

These changes in migration drivers and destinations are also reflected in the socio-demographic profile of emigrants. While emigration affects all social groups, it increasingly involves young, educated and skilled individuals, including those employed and with middle or higher incomes. By contrast, during the first two decades of the transition, emigrants were predominantly less educated, unemployed and low-income individuals (King and Gëdeshi, 2020).

This transformation is also highlighted by Leitner (2021), who, analyzing Labour Force Survey data for Western Balkan countries, estimated that, during the period 2012–2019, around 40% of migration flows from Albania consisted of young people in their early twenties with university education, while approximately 30% comprised teenagers with vocational education. Compared to other Western Balkan countries, Albania recorded the highest intensity of brain drain, followed by Bosnia and Herzegovina and Kosovo.

A World Bank report (2025) shows that tertiary education levels among Albanian emigrants (18%) and non-emigrants (19%) are broadly comparable. However, educational attainment is higher among younger

emigrant cohorts and in newer destinations, particularly the US (33%), Germany (24%) and the UK (19%), compared to only 5% among older migrant cohorts in Greece. This suggests that the educational selectivity of Albanian emigration is a relatively recent phenomenon, associated with newer migration destinations.

This shift towards younger and more highly educated emigrants is illustrated by CESS surveys covering three interrelated dimensions: student migration, medical brain drain and the formation of a scientific diaspora. Together, they highlight both the loss of human capital and the potential for diaspora engagement to contribute to Albania's development.

Student migration or proto-brain drain

Albania ranks among the first countries in the Balkans and in Central and Eastern Europe with the highest levels of student mobility. According to the latest UNESCO data, in 2023 around 15,073 Albanian university students, or 12.4% of all students enrolled in Albania, were studying abroad.[3] The countries ranking ahead of Albania – Montenegro, Moldova, Slovakia and Bosnia and Herzegovina – display higher levels of student mobility but these are mainly towards the former federal states of which they were once part. In these cases, explanatory factors include historical ties, identical or similar languages, geographical proximity, shared cultural values and the higher quality of host universities. Albania represents a particular case, as it is not linked to any post-colonial or post-imperial system of relations and is characterized by a relatively low level of income *per capita*.

Albanian students studying abroad are often academically high-achieving, with strong foreign-language skills, independence and personal initiative. They also come disproportionately from the country's intellectual and economically advantaged families. According to the 2020 CESS survey, nearly 60% had both parents with university education, almost twice the proportion recorded among students studying in Albania (King and Gëdeshi, 2023).

Studying at universities in developed OECD countries is broadly seen as a positive phenomenon, as it contributes to both the quantitative and, especially, qualitative growth of the country's human capital. Investments in this capital are made by families and individuals, as well as by the Albanian government and international sources. However, the key question is whether the tens of millions of euros invested each year return to the country of origin in the form of human capital or are, instead, absorbed by host countries.

[3] https://databrowser.uis.unesco.org/

A study realised in 2021 shows that 94.6% of Albanian students studying in developed OECD countries do not intend to return to Albania in the near future (King and Gëdeshi, 2023). This result raises a serious concern and has two major negative consequences. First, through this potential brain drain, Albania risks losing the most highly educated segments of its youth trained in developed OECD universities. Second, this potential brain drain represents a substantial loss of investment in human capital. Based on estimated education costs and students' intentions not to return, the annual value of this potentially lost investment could reach approximately €187 million, under the assumptions outlined in the study (Westminster Foundation for Democracy, 2020; King and Gëdeshi, 2023).

Emigration of Medical Doctors

If student emigration represents a proto-brain drain, medical doctors' emigration represents one of the most critical dimensions of Albania's brain drain. Over the past decade, Albania has experienced a very high intensity and rapid growth of doctors' emigration, reaching one of the highest levels in Europe relative to its population. An OECD publication (2025) estimates that, in 2020, 2,876 medical doctors from Albania were working in OECD countries, equivalent to 34.8% of the number of doctors practising in Albania. The report ranks Albania among the top 20 countries worldwide (19th) in terms of medical doctor emigration relative to population size (OECD, 2025). In Germany alone – one of the main destination countries for Albanian physicians – by the end of 2024, there were 1,240 Albanian doctors, compared to only 149 in 2013, representing a more than eightfold increase (BÄK, 2025).

The emigration of medical doctors involves a highly trained segment of Albania's human capital, including young physicians seeking better opportunities for specialisation and professional advancement. This process has serious immediate and long-term consequences for the quality and functioning of Albania's healthcare system, while also representing a substantial loss of human capital and the public and private investments made in medical education and training.

In all likelihood, the emigration of medical doctors from Albania will continue in the coming years. A survey of 731 doctors currently living and working in Albania revealed that 39.7% intend to emigrate, with this proportion rising to 52.9% among those aged 24–40. Their preferred destinations include Germany, the US, the UK, and Italy. The motivations behind their intention to emigrate can be grouped into three main categories: economic factors, including the desire for a higher standard of living, better working conditions, and higher salaries; educational aspirations, both for themselves and their children; and a perceived lack

of future prospects in Albania (Gëdeshi and King, 2026; Gëdeshi et al., 2026).

The emigration of doctors has thus contributed to the formation of a medical diaspora, concentrated primarily in highly developed OECD countries such as Germany, Italy, and the US. Nearly 60% of these surveyed doctors, currently employed in hospitals, clinics, and other healthcare institutions abroad, express a willingness to cooperate with healthcare institutions in Albania (Gëdeshi et al., 2024). This brings us from the concept of brain drain to that of diasporas, which can be mobilized for the development of the country of origin.

Scientific Diaspora

Albania has a relatively large scientific diaspora, comprising highly educated people living abroad, including scientists, university teachers, researchers and advanced students. A survey conducted by the Center for Economic and Social Studies (CESS) focused specifically on Albanian citizens who had completed or were pursuing PhD studies in developed OECD countries (Gëdeshi and King, 2021). This represents a highly qualified and dynamic segment of the scientific diaspora, with considerable potential to contribute to Albania's economic, social and scientific development.

For a small country such as Albania, the scientific diaspora is considerable. In 2018, the scientific diaspora was estimated to comprise at least 2,500 individuals, equivalent to around 40% of the number of PhD holders living and working in Albania at that time (Gëdeshi and King, 2021).

The 2018 CESS survey of 725 PhD holders and doctoral students in developed OECD countries showed that the Albanian scientific diaspora was relatively young (average age 37; 72% under 40). Nearly two-thirds had completed their undergraduate studies abroad. Although dispersed across more than 40 countries, almost three-quarters lived and worked in six: the US (28%), Italy (15%), France, Canada, the UK and Germany (around 7% each). Members represented all academic fields, with 62% working in universities, laboratories and scientific institutions and 97% in positions matching their qualifications, indicating little deskilling or brain waste. The diaspora has strong individual but weak structural social capital, while maintaining emotional and material ties with Albania and a strong sense of national belonging (Gëdeshi and King, 2021).

Many countries attach special importance to their scientific diasporas, seeking to mobilize them for the benefit of their countries of origin. This raises the question: can Albania mobilize its scientific diaspora? Two main pathways could enable the PhD-level diaspora to contribute to Albania's socio-economic, scientific and intellectual development.

The first is through return migration. Highly qualified emigrants who have studied and worked in universities, laboratories and scientific institutions in developed OECD countries could bring knowledge and skills capable of revitalizing academic and scientific life in Albania. However, according to the CESS survey, only 17% expressed a desire to return, while nearly 50% remained undecided (Gëdeshi and King, 2021).

The second – and more realistic – pathway is cooperation with universities and scientific institutions in Albania. Nearly 88% of surveyed PhDs expressed willingness to cooperate through lectures, joint research projects, consultancy, scientific publications, doctoral supervision, conferences and training programmes (Gëdeshi and King, 2021). Consequently, cooperation with the scientific diaspora should be promoted through institutional initiatives undertaken by universities and research institutions in Albania, facilitated by advances in communication technologies.

The growing emigration of students and highly skilled professionals has intensified Albania's loss of human capital, while contributing to the formation of an increasingly educated diaspora. Although permanent return remains limited, this diaspora offers considerable potential for knowledge transfer and institutional cooperation. Realising this potential requires policies that both address the structural drivers of emigration and facilitate sustained engagement with Albanian institutions.

Consequences and opportunities of youth migration and brain drain for the Albanian economy and society

The third question concerns the relationship between migration and development – or underdevelopment – in the country of origin. The literature on the migration–development nexus distinguishes between two main perspectives: an optimistic and a pessimistic one (de Haas, 2010). The former emphasizes the potential benefits for origin countries, host countries and migrants themselves – a 'triple-win' situation – through remittances, reduced unemployment, higher incomes, return migration and diaspora investment. The latter highlights the risks of depopulation, brain drain, dependence on remittances, labour shortages and social costs, potentially undermining development in countries of origin. In this sense, emigration may also represent a transfer of human capital from poorer to richer countries (King, 2018).

Both the benefits and costs of migration are evident in Albania, where emigration has become a major factor shaping the country's economic and social development. The growing selectivity of migration, particularly among young and highly educated people, raises new challenges but also creates potential opportunities for development.

Population Decline and Demographic Transformation

One of the most severe consequences of emigration is population decline and the progressive imbalance of the demographic structure. At the beginning of the post-socialist transition, Albania had 3.25 million inhabitants, with a relatively young population (57.8% of working age)[4] distributed across the country (INSTAT, 1992).

After 35 years of sustained emigration and declining fertility, Albania's resident population has fallen to 2.36 million (INSTAT, 2025a). The Albanian population is now divided into two almost numerically equal but demographically distinct groups. The 'new Albanian diaspora' continues to grow through migration and natural increase, while its educational profile is strengthened by ongoing brain drain from Albania. As Table 2 shows, the diaspora has a considerably younger demographic structure than the resident population, with a higher proportion of working-age individuals (77.2% compared with 63.7%) and a much smaller share of people aged 65 and over (5.1% compared with 21.2%).

Table 2. Age Structure of the New Albanian Diaspora and Resident Population, 2025 (%)

Age group	New Albanian diaspora (%)	Resident population (%)	Difference (pp)
0–14	17.7	15.1	+2.6
15–29	23.9	17.2	+6.7
30–64	53.3	46.5	+6.8
65+	5.1	21.2	−16.1
Total	**100.0**	**100.0**	**0.0**

Source: Civil Status Register (2025) and INSTAT (2025).

Note: Difference = diaspora share minus resident population share, in percentage points (pp).

By contrast, Albania's resident population is ageing and steadily shrinking, while emigration intentions remain particularly high among younger age groups. Its territorial distribution is also increasingly unbalanced, with continued depopulation of peripheral and rural areas alongside the concentration of population in major urban centres.

[4] The working-age population was defined as up to 60 years old.

Labour Shortages and Immigration

One of the most serious consequences of sustained emigration and demographic decline is the growing shortage of labour, both skilled and less-skilled, in key sectors of the Albanian economy, including industry, construction, tourism, hospitality and agro-processing. According to the World Bank (2025), around 45% of enterprises in Albania report difficulties in filling vacancies, while labour shortages are expected to worsen by 2030. This represents an increasingly important structural constraint on the country's economic development.

These shortages have also contributed to the emergence of labour immigration, particularly from Asian and African countries. According to INSTAT (2025c), the number of foreigners holding residence permits increased from 14,900 in 2021 to 21,900 in 2024, with around 35% originating from Asia and Africa. These migrants are employed mainly in construction, manufacturing, services and agriculture.

Although immigration helps alleviate labour shortages, recruiting foreign workers may involve additional costs related to recruitment, transportation, accommodation and integration. Moreover, labour immigration concentrated in these sectors cannot fully compensate for the loss of highly qualified Albanian professionals through brain drain. Thus, immigration offers only a partial response to Albania's labour shortages and does not reverse the broader demographic and human-capital losses associated with sustained emigration.

Remittances

Remittances have been a major channel through which emigration has influenced Albania's economy, particularly during the first two decades of the post-socialist transition. Before the global financial crisis, they accounted for 10–22% of GDP, placing Albania among the world's most remittance-dependent countries (Mansoor and Quillin, 2006). While remittances contributed significantly to poverty alleviation (de Soto et al., 2002), they also supported an 'extroverted' economy characterized by consumption exceeding domestic productive capacity (Samson, 1996). Only 9–12% were invested in productive activities (de Zwager et al., 2005), limiting their contribution to long-term development.

The maturation of the migration cycle, particularly family reunification, and the global financial crisis contributed to a sharp decline in remittances after 2008, as anticipated by earlier studies (Gëdeshi, 2002; Nikas and King, 2005).

By 2024, remittances had surpassed their 2007 level in absolute terms. However, this recovery conceals important changes associated with the expansion and evolving demographic and educational profile of

Albanian emigration. Despite the growing number of emigrants and their increasing concentration in higher-income countries, remittance flows have not increased proportionately. This suggests a weakening of the traditional relationship between the size of the emigrant population and the volume of remittances.

The World Bank (2025) identifies significant differences in remittance behaviour across migrant groups. While nearly half of return migrants reported sending remittances during their stay abroad, only around one-third of current emigrants had done so. Younger and more highly educated emigrants are also less likely to send remittances: only 25% of those aged 15–24 and 34% of those aged 25–34 reported doing so, compared with 49% of those aged 45–54. Similarly, only 27% of tertiary-educated emigrants reported sending remittances, compared with 43% of those with secondary education. These differences suggest that the growing selectivity of Albanian emigration may further weaken the relative importance of remittances.

Moreover, the development contribution of remittances remains limited by their predominantly consumption-oriented use. According to the World Bank (2025), remittances are mainly directed towards everyday household consumption, healthcare and education, while less than 2% of recipient households report using them for business or agricultural investment.

Thus, although remittances have increased in absolute terms, their relative economic importance and capacity to support productive investment remain limited. As Albanian emigration becomes increasingly concentrated among younger and more highly educated groups, its traditional remittance-based benefits may weaken further, reinforcing the development challenges associated with the loss of human capital.

Opportunities

Migration does not only produce consequences but also creates opportunities through which certain of its dimensions – such as return migration, circular migration and the formation of a diaspora – may serve the socio-economic development of the country of origin. The key question is whether, and to what extent, these opportunities are being translated into tangible development benefits for Albania.

Return Migration

Return migration can contribute to Albania's long-term development through the transfer of human capital (knowledge, skills and professional experience), financial capital (savings and investments) and social

capital (networks and connections). However, these benefits depend on migrants' experience abroad, their motivations for return and, importantly, the economic and institutional conditions that enable the productive use of their accumulated capital (King, 2022).

CESS surveys reveal a low propensity to return among highly educated Albanian emigrants: only 5% of students abroad intended to return after completing their studies (King and Gëdeshi, 2023), compared to 15% of medical doctors abroad (Gëdeshi et al., 2024) and 17% of the scientific diaspora (Gëdeshi and King, 2021).

Previous studies distinguish four main categories of return migrants: those forcibly returned, those returning because of economic difficulties abroad, those motivated by family or personal reasons, and those who return after achieving their migration objectives (ETF, 2007; Gëdeshi and King, 2018). The latter group, comprising only around 6% of returnees according to the World Bank (2025), has particularly strong development potential through the productive use of accumulated human, financial and social capital.

Although some return migrants have successfully invested in Albania by combining financial resources with experience and networks acquired abroad (Barjaba, 2018), the World Bank (2025) finds that relatively few invest, mainly in small family businesses in services, construction and agriculture. Consequently, the development potential of return migration remains largely underutilized.

Return migration is frequently followed by renewed intentions to emigrate. A 2018 CESS survey found that 71% of return migrants wished to re-emigrate, compared to 48% of non-migrants (King and Gëdeshi, 2020). Similarly, the World Bank (2025) found that 13% of returnees intended to emigrate within the following 12 months, compared to only 1% of non-migrants. These findings suggest that return migration does not necessarily lead to permanent reintegration in Albania. The higher propensity of return migrants to re-emigrate reflects their accumulated migration experience, social networks and familiarity with host countries, as well as dissatisfaction with employment opportunities, education and healthcare in Albania (King and Gëdeshi, 2020).

Thus, the socio-economic conditions that drive emigration also encourage re-emigration, limiting the potential of return migration to contribute to Albania's economic development.

Circular Migration

Circular migration can contribute to development in countries of origin through remittances, the transfer of knowledge and professional experience, business investment and stronger economic and social ties

with host countries (Kodra, 2021; Maroukis and Gemi, 2011). Unlike permanent return migration, it allows migrants to contribute to their country of origin while maintaining their lives and professional activities abroad.

Qualitative interviews identify several forms of circular migration in Albania, the most widespread being seasonal employment, particularly among young people. Albanian migrants engage in temporary work in agriculture, construction, tourism and other services, mainly in Greece, Italy and other European countries.

Seasonal migration contributes to Albania's economy through earnings brought home and professional experience acquired abroad. According to the Bank of Albania (2025), income from seasonal migrants increased from €317 million in 2021 to €664 million in 2024. Better coordination of seasonal migration with Albania's domestic labour needs could enhance its development benefits.

Circular migration can also contribute to development through businesses established by Albanian emigrants in their country of origin, particularly in services, construction and manufacturing. Such investments can create employment, transfer technologies and managerial practices, and strengthen economic ties between Albania and host countries (Barjaba, 2018).

Another important form is 'brain circulation', whereby highly skilled Albanian emigrants, including doctors, engineers, academics and IT specialists, undertake temporary professional activities in Albania, facilitating the transfer of advanced knowledge, skills and professional practices from host countries.

Mobilization of the Diaspora

Albania's large and increasingly educated diaspora represents a potential source of human, financial and social capital for the country's development. Concentrated mainly in developed OECD countries, it maintains ties with Albania and offers opportunities for investment, knowledge transfer and institutional cooperation (World Bank, 2025; Barjaba, 2019).

Studies indicate that Albanian emigrants' savings substantially exceed the remittances they send home, yet only a small share is invested productively in Albania (de Zwager et al., 2010; World Bank, 2025). This highlights the considerable gap between the diaspora's financial resources and their contribution to investment in the country of origin.

The Albanian diaspora has also developed considerable entrepreneurial capacity abroad. In Italy alone, Albanian emigrants owned around 32,000 businesses in 2018, yet only 13–14% had invested in

Albania, while approximately one-third expressed interest in future investments (CeSPI, 2021).

A similar gap between potential and actual engagement characterizes the highly skilled Albanian diaspora. While 88% of the scientific diaspora expressed willingness to cooperate with institutions in Albania, only 22% reported actual collaboration (Gëdeshi and King, 2021). Similarly, nearly 60% of Albanian doctors abroad expressed willingness to cooperate with Albanian healthcare institutions, but only 11.5% had done so (Gëdeshi et al., 2024).

Overall, the development potential of Albanian migration remains largely underutilised. Limited return migration, high re-emigration intentions and insufficiently developed mechanisms for circular mobility and diaspora engagement continue to constrain the transfer of knowledge, skills and capital to Albania. Realising these opportunities requires stronger institutions and more effective, coordinated policies.

Conclusions

Over the past three and a half decades, Albanian emigration has evolved from a mass, survival-driven phenomenon into an increasingly selective and structural process, disproportionately affecting young and highly educated people. Although the intention to emigrate remains high, demographic decline and the shrinking younger population are likely to reduce Albania's capacity to generate large migration flows in the future. Nevertheless, the growing educational selectivity of emigration may intensify its negative consequences for the country's long-term development.

Albania thus faces a development dilemma: while the increasingly selective nature of emigration intensifies the loss of young and skilled human capital, the traditional benefits of migration are weakening in relative importance, and the opportunities offered by return migration, circular mobility and diaspora engagement remain largely underutilised. Under current economic and institutional conditions, migration is therefore becoming a growing constraint on the country's long-term economic and social development.

The findings also demonstrate that emigration is increasingly driven by factors extending beyond economic hardship. Educational and professional aspirations, combined with dissatisfaction with corruption, limited meritocracy, weak institutions and a perceived lack of future prospects, have become important determinants of migration decisions. Addressing these structural conditions is therefore essential to mitigating the negative consequences of youth migration and brain drain.

The response to the final research question requires two complementary policy objectives: reducing the structural pressures that encourage young and skilled people to leave, while strengthening the contribution of migrants and the diaspora to Albania's development. These objectives call for an integrated approach encompassing several interconnected priorities.

First, Albania needs a transformation of its productive structure towards a more diversified, higher-productivity economy capable of generating skilled employment, competitive wages and opportunities for professional advancement. This should be accompanied by sustained investment in education, healthcare, scientific research and infrastructure, together with institutional reforms strengthening meritocracy, transparency and public trust. Such changes would not only reduce incentives to emigrate but also create more favourable conditions for the productive investment of migrants' savings and the return of human capital.

Second, policies should facilitate the sustainable return and reintegration of migrants, particularly highly skilled professionals and entrepreneurs, by improving opportunities to apply the knowledge, experience and capital accumulated abroad. At the same time, circular migration should be encouraged through bilateral agreements, recognition of qualifications and institutional arrangements supporting temporary professional mobility and knowledge transfer. These policies should acknowledge that migration and return are often part of a continuing process rather than a permanent relocation in one direction.

Third, Albania should develop a more active and structured diaspora engagement policy, moving beyond the traditional reliance on remittances towards the mobilisation of the diaspora's human, financial and social capital. Priority should be given to identifying and connecting Albanian professionals, researchers and entrepreneurs abroad with institutions and development opportunities in Albania. This would require stronger professional and business networks, digital platforms facilitating cooperation, targeted investment incentives and programmes enabling diaspora experts to contribute to universities, research institutions, healthcare and other strategic sectors.

The empirical findings provide a strong rationale for this approach. While only a small proportion of highly skilled emigrants intend to return permanently, their willingness to cooperate with Albanian institutions is considerably greater. Among the scientific diaspora, 88% expressed willingness to cooperate, compared with 22% who reported actual collaboration; among Albanian doctors abroad, the corresponding figures were nearly 60% and 11.5%. This gap suggests that diaspora engagement should not depend primarily on permanent return**,** but should instead prioritise institutionalised knowledge circulation, temporary professional mobility and sustained cross-border cooperation.

Finally, implementing these priorities requires stronger institutional coordination and a coherent long-term migration and diaspora strategy, supported by clearly defined responsibilities, adequate resources and mechanisms for monitoring results. A dedicated national agency or another central coordinating institution could provide the framework for integrating migration policies with broader economic, educational, scientific and social development objectives.

Ultimately, Albania's development prospects will depend not simply on reducing emigration, but on creating the economic and institutional conditions that enable its human capital to remain, return or contribute from abroad. Only through such a transformation can migration gradually shift from a source of demographic and human-capital depletion towards a resource for sustainable development.

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Migration in Bosnia and Herzegovina – Historical Trends, Contemporary Dynamics and Regional Flows

Adnan Efendić

Introduction

Migration has been one of the defining demographic, social and economic processes shaping Bosnia and Herzegovina (BiH) in the past, including in the more recent time its transition, the war and post-conflict periods. Its contemporary significance reflects both the exceptional migration history of the country and the persistence of substantial population mobility long after the end of the 1992 – 1995 war that was a structural brake in the migration dynamics. Successive migration waves have been driven by different circumstances, ranging from economic opportunities abroad and forced displacement to post-war return and, more recently, wage and employment differentials, institutional and political conditions, and growing demand for labour in European destination countries.

The character of migration has also changed considerably over time. Economic labour migration towards Western Europe was already well established during the period of socialist Yugoslavia (1945 – 1991), while the 1992 – 1995 Bosnian war produced mass forced displacement within and outside the country. The immediate post-war period was subsequently characterised by large-scale refugee repatriation and the return of internally displaced persons. As these movements subsided, economically motivated emigration gradually regained importance and accelerated substantially during the 2010s (Kadusic and Suljic, 2018).

Contemporary migration from BiH is more complex than a conventional pattern of permanent emigration. Permanent settlement abroad increasingly coexists with temporary and seasonal labour migration, circular mobility, family reunification, education-related migration,

and return. Migration connections with neighbouring and other former Yugoslav countries remain particularly important, supported by geographical proximity, common or closely related languages and long-established social and economic networks. Croatia, Serbia, Slovenia and Montenegro, former Yugoslav republics, therefore, remain important components of the BiH migration network, alongside traditional Western European destinations such as Germany, Austria and Switzerland (Efendic and Ferre, 2023). The current emigration intentions remain high, and not only in Bosnia and Herzegovina, but also in the whole Western Balkans region (Ergezer, 2025).

Against this background, the remainder of the chapter is organised into two main sections. Section 2 provides a historical overview of migration in Bosnia and Herzegovina, distinguishing between post-WWII economic migration, forced migration during the 1992 – 1995 war and post-war return, and renewed economic migration. Section 3 focuses on contemporary migration flows over the last two decades, examining their scale and geographical direction, with particular attention to migration between BiH and other Western Balkan countries. It further discusses the changing characteristics and main drivers of contemporary migration, before considering return, temporary and circular migration, and other emerging patterns of mobility.

History of Migration in Bosnia and Herzegovina

Migration has been a persistent feature of the demographic, economic and social development of Bosnia and Herzegovina (BiH) throughout its a thousand-year long history (Malcolm, 1996). Although population movements from the territory of present-day BiH have a considerably longer history, the migration patterns most relevant for understanding the country's contemporary demographic and socioeconomic structure developed primarily after the Second World War (WWII). These movements were shaped by fundamentally different circumstances over time, ranging from predominantly economic labour migration during the post-WWII period, through large-scale forced displacement during the war, to mass repatriation and return in the immediate post-war period and renewed economic migration thereafter, including high intentions to emigrate even nowadays. These different phases of migration are discussed in the following sections.

Pre-War Economic Migration

The first major phase relevant for contemporary migration patterns extends from the period following the Second World War until the

beginning of the 1990s, when BiH formed part of former Yugoslavia. Migration during this period was predominantly economic and was closely connected with Yugoslavia's increasing integration into Western European labour markets. In particular, the liberalisation of international labour mobility from the 1960s onwards enabled workers from Yugoslavia to seek temporary employment abroad, contributing to the emergence of substantial migrant communities in Western European countries (Halilovich et al., 2018).

This migration developed within the broader European *Gastarbeiter*, or guest-worker, system. The original expectation underlying this model was that workers would spend a limited period abroad and subsequently return to their countries of origin. In practice, temporary labour mobility frequently developed into longer-term or permanent settlement, while family reunification contributed to the consolidation of migrant communities in destination countries. Germany became a particularly important destination following the bilateral labour recruitment agreement with Yugoslavia in 1968, while Austria and Switzerland also attracted substantial numbers of Yugoslav workers (Valenta and Ramet, 2011).

This early phase of labour migration is important for understanding subsequent migration developments for at least two reasons. First, it established substantial communities of BiH origin abroad well before the conflicts of the 1990s in the region. Second, these communities created migrant networks connecting BiH with the main destination countries. Migrant networks can reduce the costs and uncertainty associated with migration by providing prospective migrants with information about employment, housing and conditions in destination countries, as well as financial and social support. As Massey (1990) pointed out, migrant networks can generate powerful feedback mechanisms through which established migration facilitates subsequent migration, giving the migration process a strong internal momentum and contributing to its cumulative causation. The migration infrastructure and networks established during the socialist period therefore remained relevant for later migration waves, including the most extensive one that occurred as the consequence of the Bosnia war 1992 – 1995.

Forced Migration During the 1992 – 1995 War

The outbreak of war in 1992 fundamentally changed both the character and scale of migration in Bosnia and Herzegovina. Predominantly, economic migration was replaced by mass forced displacement, including both international refugee movements and internal displacement. The war resulted in approximately 1.2 million people leaving the country and a further one million being displaced internally out of 4.1 million being registered in the latest pre-war census (1991). Put it simply, every second

person moved either internally or externally. In other words, more than half of the pre-war population was forced to leave their place of residence, making this the most dramatic migration episode in the country's recent history (Kadusic and Suljic, 2018). The displacement was particularly intensive during the early stages of the war, with more than 800,000 BiH citizens leaving the country between 1992 and 1993 alone (Kupiszewski, 2009).

The geographical pattern of wartime migration was strongly influenced by geographical proximity, existing social and family networks, and the capacity of different countries to receive refugees. Neighboring countries and other former Yugoslav republics became particularly important destinations. Approximately 40% of BiH citizens who emigrated during 1992 – 1995 moved to Croatia, Serbia, Montenegro and Slovenia. These countries, together with Germany and Austria, hosted approximately 75% of forced migrants from BiH (Kadusic and Suljic, 2018). More detailed destination-country data identify Croatia as the largest receiving country, with around 263,000 migrants from BiH, followed by Germany (240,000), Austria (134,000), Serbia (131,000), the United States (121,000), Slovenia (97,000), Switzerland (59,000), and Sweden (Efendic et al., 2014). Thus, wartime displacement substantially strengthened migration links between BiH and neighboring countries while simultaneously expanding and geographically diversifying the BiH diaspora.

The drivers and patterns of conflict-related migration were considerably more complex than a simple movement directly from BiH to a foreign destination. Forced international migration frequently developed as a two-stage process. Conflict initially resulted in internal displacement, which involved ethnic cleansing and related mass fatalities (Olzak 2011), and was subsequently followed by international migration. In some cases, emigration occurred only after displaced persons had returned to their pre-war homes or after the conflict had formally ended (Oruc et al., 2019). Reflecting this complexity and the difficulty of separating wartime displacement from its immediate post-war consequences, Kondylis (2010), for example, treats population movements in BiH up to 2000 as conflict-related migration. However, many migrants have multiple migration identities (forced, internal, external, returnees,…), and contemporary studies show that former migrants have systematically higher intentions to emigrate again (Efendic, 2016).

The war and associated population movements also produced a structural break in the demographic and ethno-regional composition of Bosnia and Herzegovina. In addition to substantially reducing the country's population, forced displacement contributed to a pronounced transformation from ethnic diversity towards greater ethnic homogeneity across much of the country. This spatial reorganisation of the population was largely imposed through conflict and violence rather than repre-

senting a voluntary process of population sorting (Malcolm, 1996). The consequences persisted well beyond the end of the conflict. Empirical research has associated the conflict-induced reduction in local ethnic diversity with adverse outcomes for individual economic welfare (Efendic and Pugh, 2018), the growth aspirations of young businesses (Efendic et al., 2015), and the social capital of local communities (Efendic, 2020). Where preserved, ethnic diversity remain to work as an economic potential which bring economic benefits and returns.

The end of the war did not immediately bring conflict-related migration to an end. Following the signing of the General Framework Agreement for Peace in 1995, migration trajectories increasingly diverged. Some refugees returned to BiH, others remained permanently or for extended periods in their receiving countries, while some moved onwards to third countries. These different post-war trajectories marked the transition from large-scale forced displacement towards the mass repatriation and return that characterised the immediate post-war period.

Post-War Return and Renewed Economic Migration

The end of the war in 1995 initiated another distinctive phase in the migration history of Bosnia and Herzegovina. In contrast to the preceding period of mass forced displacement, the immediate post-war years were characterised primarily by large-scale repatriation of refugees from abroad and the return of internally displaced persons. Return was also an integral part of the post-war institutional framework, with Annex VII of the General Framework Agreement for Peace establishing the right of refugees and displaced persons to return to their pre-war homes.

The scale of return during the immediate post-war period was considerable and was particularly concentrated in the first years following the conflict. More than half of all recorded returnees returned during the first three years following the peace agreement (MHRRBiH, 2005). Approximately 40% of BiH refugees were repatriated and estimates suggest that by 2010 almost half a million people had returned from abroad. When internally displaced persons are included, more than one million people returned to their pre-war places of residence (Colville, 2004; MHRRBiH, 2006; FMDPR, 2011). Return patterns were also influenced by the policies adopted by receiving countries. Germany, for example, repatriated more than 194,000 persons to BiH during 1997 – 1998, while some other countries, including the Netherlands, provided financial assistance intended to support return and reintegration (Efendic et al., 2014).

Nevertheless, return did not fully reverse the demographic consequences of wartime displacement. Post-war trajectories broadly involved three outcomes: return to BiH, continued settlement in the original receiving

country and onward migration to a third country. Estimates suggest that around 40% of emigrants returned to BiH, approximately 18% moved onwards to third countries, while the remaining 42%, or around half a million people, continued to live in their original host countries (Koning, 2008). MHRRBiH (2012) reports at that time that around 55% of BiH emigrants had strong desire to return to BiH one day. However, return itself was not necessarily permanent, as some returnees subsequently emigrated again. The immediate post-war migration landscape should therefore be understood as a combination of repatriation, continued settlement abroad and further international mobility rather than as a simple reversal of wartime displacement.

As the large repatriation wave gradually subsided, the nature of migration from BiH changed again. During the 2000s, voluntary emigration became increasingly important, driven by economic conditions, high unemployment, limited employment and career opportunities, political instability, institutional inefficiencies and broader concerns about living conditions. Evidence from returnees supports this transition: among individuals who migrated after 1997, employment and opportunities to obtain a better job again emerged as the dominant reasons for leaving BiH. Family reunification also became more prominent than among pre-war labour migrants, reflecting the sizeable BiH communities established abroad through previous migration waves (Efendic et al., 2014).

Migration during the first decade of the 2000s was nevertheless less dynamic than it would become subsequently. Access to Western European countries remained comparatively difficult and costly, as BiH citizens required visas to enter most EU countries. Despite these constraints, emigration continued. Eurostat data indicate that 143,985 BiH citizens entered EU countries between 2000 and 2007 (MSBiH, 2012), while other international data also point to a steady increase in the stock of BiH emigrants in major OECD destinations during this period (Efendic and Fere, 2023). The 2000s can therefore be regarded as a transition between the exceptional migration dynamics associated with war and post-war return and the renewed acceleration of international mobility that followed.

An important turning point came with the gradual liberalisation of mobility between BiH and the European Union. The implementation of visa facilitation and readmission arrangements between the EU and BiH from 2008 simplified travel and facilitated different forms of international mobility, particularly among individuals able to rely on established diaspora networks. These institutional changes coincided with improvements in road infrastructure and the expansion of air connections between BiH and Western European destinations with sizeable BiH-origin populations. Easier and less costly travel facilitated family contacts and provided more direct access to information about foreign labour markets, housing

and professional opportunities. Together, these developments made migration opportunities more accessible, predictable and tangible for a broader segment of the BiH population (de Zwager and Gressmann, 2010).

These changes became particularly visible during the 2010s, when outward migration accelerated considerably. This period also involved a change in the relative importance of migration drivers. While migration during the 1990s had been dominated by strong push factors associated with conflict and its immediate consequences, migration during the second decade of the 2000s increasingly reflected an interaction between persistent domestic push factors and stronger pull factors in destination countries (Halilovich et al., 2018). Perceptions of an unfavourable political and economic environment, limited professional opportunities and insecurity in BiH increasingly interacted with growing demand for labour, higher earnings and better employment, and living opportunities in EU countries (Cicic, 2019).

The magnitude of these movements is substantial. Estimates based on Labour Force Survey data indicate a net migration-induced population loss of more than 400,000 people between 2011 and 2019, equivalent to approximately 13% of the BiH population (Leitner, 2021). Importantly, the losses were not distributed evenly across the population. As illustrated in Figure 1, all age cohorts experienced substantial net emigration over the period, but younger cohorts were particularly affected. The largest

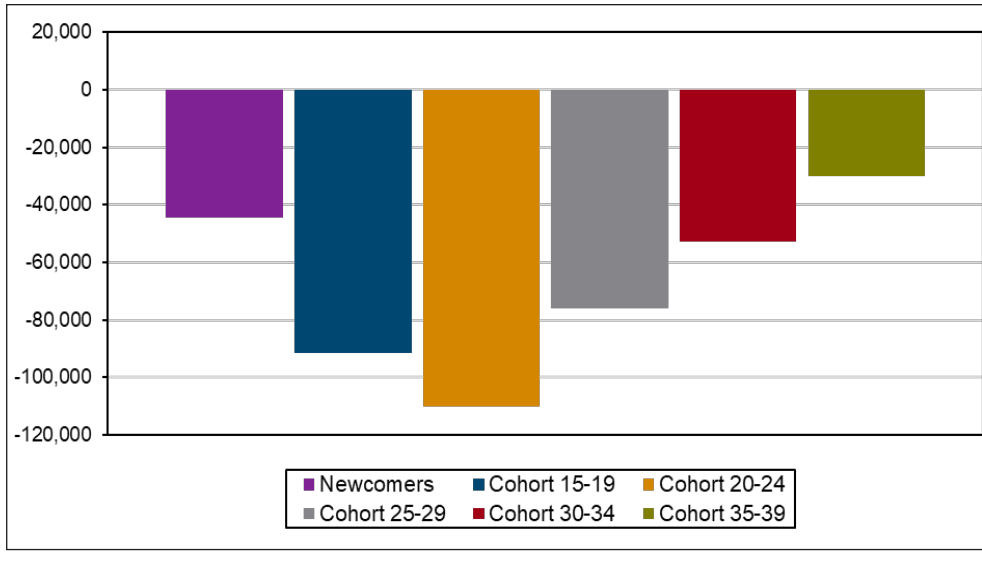


Figure 1. Estimated net migration by age cohort in Bosnia and Herzegovina, 2011 – 2019

Source: *Leitner, 2021.*

estimated loss was recorded among those aged 20-24, followed by the 15-19 and 25-29 age groups. The magnitude of migration among these younger cohorts indicates that recent emigration has affected not only the overall size of the population but also its demographic and productive structure. The loss of younger people directly reduces the current and future labour supply and, through its interaction with low fertility, contributes to population ageing and a further contraction of the working-age population (Leitner, 2021).

The post-war period can therefore be understood as a transition through several overlapping migration patterns. The first years after 1995 were dominated by large-scale refugee repatriation and the return of internally displaced persons; the 2000s witnessed continued but comparatively less dynamic economically motivated emigration; and from the end of that decade, easier international mobility, established diaspora networks and stronger labour demand in destination countries contributed to a renewed acceleration of migration. By the 2010s, emigration had become a structural demographic and socioeconomic process in its own right, rather than simply a residual consequence of war and post-war adjustment. This provides the basis for the more detailed analysis of contemporary migration flows, their geographical direction and changing characteristics in the following section.

Contemporary Migration Flows in Bosnia and Herzegovina over the Last Two Decades

During the last two decades, migration from Bosnia and Herzegovina (BiH) has undergone another important transformation. While the immediate post-war period was dominated by refugee return and the reintegration of displaced populations, migration since the mid-2000s has increasingly been characterised by economically motivated emigration, labour mobility and a growing diversity of migration arrangements. Permanent emigration now coexists with temporary and seasonal employment abroad, family reunification, education-related migration, circular mobility, and return migration. The intensity of outward migration increased particularly during the 2010s, when migration losses became increasingly intertwined with low fertility, population ageing and a shrinking working-age population (Cicic, 2019).

At the same time, contemporary migration can no longer be adequately described as a one-directional and permanent movement from BiH towards Western Europe. Migration links with neighbouring countries remain substantial, while the large diaspora established through earlier migration waves facilitates repeated movements between BiH and destination countries. Temporary, seasonal and circular forms of mobility

have become more visible, particularly in relation to neighbouring and other former Yugoslav countries. More recently, BiH has also experienced immigration of foreign workers and transit migration. Contemporary migration therefore represents an increasingly complex system of mobility in which permanent emigration, temporary labour migration, return, and repeated cross-border movements coexist (Efendic et al., 2023).

The demographic context makes these contemporary migration trends particularly important. High levels of emigration have occurred alongside a sustained deterioration in the natural demographic balance. BiH has recorded negative natural population growth since 2009, with the natural population change declining from -0.1 per 1,000 inhabitants in 2009 to -6.7 in 2022 (ASBiH, 2023). Negative natural population growth combined with net emigration has therefore contributed to a cumulative reduction in the country's population. According to the Agency for Statistics of Bosnia and Herzegovina (2023), the population was estimated at approximately 3.4 million in 2023, although population estimates differ considerably across available sources and some estimates are notably lower. Migration is consequently taking place in an increasingly unfavourable demographic environment in which the effects of emigration are reinforced by population ageing and natural population decline. Although a lot of debate can be found in the public discourse on the scale, sources and consequences of migration, as well as on potential policies that can be used to mitigate these change, little policies have been implemented targeting potential migrants or returnees to the country.

Scale and direction of recent emigration

Accurately measuring the scale of contemporary emigration from BiH remains challenging. Domestic administrative statistics provide only a partial picture because citizens leaving the country do not necessarily deregister their residence. Temporary and circular movements are even more difficult to capture. Consequently, assessments of contemporary migration need to combine domestic population and labour-market statistics with data from destination countries, particularly residence and work permits, as well as estimates produced by international organisations (Efendic, 2021).

Despite these measurement difficulties, the available evidence consistently points to substantial net emigration and a particularly pronounced acceleration during the 2010s. We have already reported estimates based on Labour Force Survey data which indicates that BiH experienced a net migration-induced population loss of more than 400,000 people between 2011 and 2019 (Leitner, 2021), equivalent to approximately 13% of the country's population. These losses were

not evenly distributed across age groups. All age cohorts experienced substantial net emigration, but younger generations were particularly affected. The contemporary migration challenge is therefore not simply one of population decline, but also of changes in the demographic composition of the remaining population.

The destination structure of BiH migration reflects both historical migration patterns and more recent labour-market developments. Croatia and Serbia remain particularly important in terms of the accumulated stock of migrants originating from BiH, reflecting geographical proximity, historical population movements, and strong family and social connections. Outside the region, Germany and Austria remain among the most important EU destinations, while Switzerland also hosts a sizeable BiH-origin population (Efendic, 2021).

Migration Between BiH and Other Balkan Countries

Migration between Bosnia and Herzegovina and other Balkan countries constitutes an important component of contemporary mobility and cannot be understood solely in terms of permanent changes in residence. Croatia, Serbia, Slovenia, and Montenegro are particularly relevant because migration relationships with these countries are supported by geographical proximity, common or closely related languages, historical labour-market connections, and extensive family and social networks dating from the former Yugoslav period.

Croatia occupies a particularly important position within this regional migration system. Historically, it was one of the principal destinations for both pre-war and wartime migration from BiH. More recently, its position has changed following EU membership, combining the advantages of a geographically and culturally close destination with an access to an EU labour market. This has strengthened Croatia's attractiveness for workers from BiH, including those engaged in temporary and seasonal employment. The tourism and construction sectors are particularly conducive to shorter periods of employment, making migration towards Croatia difficult to capture fully through conventional permanent-migration statistics (Efendic, 2021).

Slovenia has similarly become one of the most important destinations for contemporary labour migration from BiH. Work-permit evidence indicates substantial movements towards Slovenia and Croatia, which have emerged as the most important destinations among the former Yugoslav countries for formal employment of BiH workers (Efendic, 2021). Their importance illustrates how older regional migration networks have become incorporated into contemporary EU labour mobility.

Serbia and Montenegro are also important, particularly for temporary and circular migration. The absence of significant linguistic barriers and

the existence of historical, family and business networks reduce the costs associated with short-term mobility. Montenegro is particularly relevant for seasonal migration related to tourism, while temporary and circular movements also occur between BiH and Serbia. Such movements are likely to be substantially underestimated in conventional migration statistics because individuals may work abroad for several months without permanently changing their registered residence (Efendic, 2021).

A particularly interesting contemporary pattern can be observed in western BiH, especially the Krajina region. Some individuals work in Slovenia or Austria while maintaining their primary family and social connections in BiH. Given the relatively short travelling distances, workers may return home regularly, in some cases, almost every weekend. Their migration status is therefore difficult to classify according to the conventional distinction between migrant and resident: they effectively organise their economic and social lives across two countries. Such patterns illustrate the increasingly transnational and circular nature of migration in geographically interconnected parts of the region (Efendic and Fere, 2023).

Regional mobility can also be facilitated by citizenship arrangements. Some BiH citizens are entitled to and hold citizenship of neighbouring Croatia or Serbia, which can facilitate their access to these labour markets. In the case of Croatian citizenship, this also provides access to the wider EU labour market. Consequently, part of the actual mobility between BiH and neighbouring countries may not be fully reflected in statistics based exclusively on BiH citizenship.

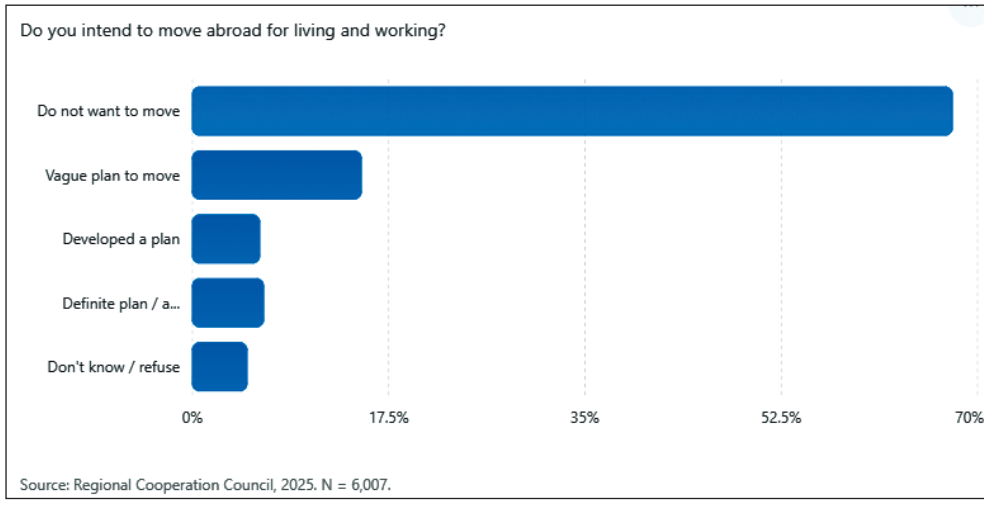


Figure 2. Emigration intentions in Western Balkans, 2025

Source: *RCC, 2025.*

Finally, emigration aspirations in the Western Balkan countries remain substantial even today. Representative survey data collected by the Regional Cooperation Council in 2025 show that 27.4% of respondents express some intention to move abroad for living and working. While 15.1% report only a vague plan to move, 6.0% have already developed a migration plan and a further 6.3% have a definite plan and have started taking concrete steps towards migration. Thus, more than one in ten respondents (12.3%) have moved beyond a general aspiration towards a more concrete migration plan. Although the majority of respondents (67.8%) do not intend to move abroad, these findings indicate that emigration remains an important prospective strategy for a sizeable share of the Western Balkan population (Regional Cooperation Council, 2025).

Changing characteristics of contemporary migration

One of the defining characteristics of contemporary migration from BiH is its increasing diversity. Permanent settlement abroad remains important, but it now coexists with temporary employment, seasonal migration, circular movements, family reunification, education-related migration, and return. Migration should therefore increasingly be understood as a continuum of different mobility arrangements rather than exclusively as a permanent transfer of residence from BiH to another country (Efendic et al., 2023).

Available evidence on residence permits supports this interpretation. Short-term permits of less than one year issued to BiH citizens in EU countries account for approximately 40% of permits, suggesting that a substantial component of contemporary migration involves shorter periods abroad. Although such data cannot capture all forms of temporary mobility, they demonstrate that international migration from BiH is not necessarily permanent. Temporary and circular migration may involve repeated periods of employment abroad followed by return to BiH, particularly where geographical proximity allows migrants to maintain strong connections with their households and communities of origin (Efendic, 2021).

The composition of migration has also changed. Contemporary migration involves young people entering foreign labour markets, workers with vocational qualifications, highly educated professionals, students, and individuals moving through family reunification. While the emigration of highly educated individuals receives considerable public attention, available evidence suggests that recent migration losses are not limited to this group. Labour Force Survey estimates indicate that people with medium-level vocational education and training constitute a particularly substantial component of recent emigration (Leitner, 2021).

Contemporary migration therefore represents a broader loss of working-age population and human capital rather than exclusively a conventional "brain drain".

This diversification has important implications for understanding the relationship between migration and the domestic labour market. Emigration can coexist with unemployment and inactivity while simultaneously generating shortages in particular occupations. The departure of vocationally trained workers may create difficulties in sectors such as construction, manufacturing, tourism and other services, while the emigration of highly skilled workers can generate shortages in occupations requiring substantial investments in education and professional training. Migration is thus increasingly connected to the structure and quality of domestic employment rather than merely to the aggregate unemployment rate.

Main drivers of recent migration

Economic factors used to be in the past central to contemporary emigration from BiH, but the underlying motivations have become more complex than a simple response to unemployment in the more recent times. Differences in wages and employment opportunities between BiH and destination countries remain important, while job security, working conditions, career progression and broader expectations about future living standards increasingly influence migration decisions. Political instability, perceptions of institutional inefficiency and uncertainty about the country's future overpass these economic motivations (Efendic et al., 2023), including general perception of human security (Ergezer, 2025). This reflects post-conflict nature of the society.

The evolution of migration during the 2010s can also be interpreted as a gradual change in the relative importance of push and pull factors. Earlier migration, and particularly that of the 1990s, was dominated by powerful domestic push factors associated with war and post-conflict instability. More recent migration increasingly reflects the interaction between continuing domestic dissatisfaction and stronger external pull factors, particularly increased demand for labour in EU countries (Halilovich et al., 2018; Cicic, 2019; UNDP and UNICEF, 2022). Higher wages and better employment opportunities abroad therefore operate alongside domestic economic and institutional conditions in shaping migration aspirations.

This interpretation is also important because contemporary emigration cannot be explained by unemployment alone. Migration aspirations remain substantial among people who are already employed, indicating that having a job does not necessarily remove the incentive to migrate. The quality of employment, remuneration, contractual security, and

opportunities for professional advancement are therefore increasingly relevant. From this perspective, reducing migration pressures requires more than employment creation; it also requires improvements in the quality and attractiveness of domestic employment opportunities (Cicic, 2019).

The BiH diaspora itself plays an important role in sustaining these migration processes. Networks established through earlier labour migration and wartime displacement provide potential migrants with information, accommodation, employment contacts, and other forms of support. Diaspora networks therefore reduce both the economic costs and uncertainty associated with migration. This can produce a self-reinforcing process in which earlier migration facilitates subsequent migration, even when the original conditions that had produced the initial migration wave have changed. However, some decide to return to BiH for different reasons.

Return, circular migration and emerging migration patterns

Return migration represents an important but insufficiently documented component of contemporary migration in Bosnia and Herzegovina. While forced returns and readmission procedures are relatively well recorded (Efendic and Ferre, 2023), systematic information on voluntary, and particularly economically motivated return, remains limited. One of the main reasons is that economic migrants are generally not required to register either their departure from or their subsequent return to BiH. Consequently, official statistics provide only a partial picture of the scale and characteristics of return migration (Cicic, 2019). This statistical limitation is particularly important given the increasingly temporary and circular character of migration discussed above.

Available primary evidence nevertheless provides useful insights into the characteristics of returnees. A representative survey of more than 6,000 respondents conducted in BiH in 2015 identified around 10% of respondents as returnees, defined as individuals who had spent more than three months abroad before returning to BiH. The evidence suggests that returnees differ from the non-migrant population in several potentially important respects. They are, on average, more highly educated, more likely to live in urban and suburban areas and somewhat more likely to engage in entrepreneurial activity. The difference in educational attainment is particularly notable: 26.2% of returnees had tertiary education compared with 15.6% of the overall sample (Williams and Efendic, 2019). These characteristics indicate that return migration may provide a mechanism through which some of the human capital, skills and experience accumulated abroad are transferred back to BiH.

However, the socioeconomic reintegration of returnees is not without difficulties. The same survey indicates an unemployment rate of approximately 24% among returnees, compared with 21% among the rest of the population, although returnees were also somewhat more likely to be formally employed. Evidence from Williams and Efendic (2020) further suggests that returnees are more exposed to informal employment: approximately 26% of former external migrants worked in the informal economy compared with 21% of the domestic population, while econometric estimates indicate a systematically higher probability of participation in undeclared work among returnees. Economic insecurity following return may therefore encourage repeated migration and contribute to temporary, seasonal and circular mobility rather than permanent reintegration.

Institutional conditions represent another important dimension of the return experience. Returnees tend to report systematically lower trust in public institutions, which may partly reflect comparisons between the institutional environment in BiH and the more developed and stable institutional settings experienced while living abroad (Williams and Efendic, 2019). This represents an important potential constraint on sustainable return. International experience may provide returnees with additional knowledge, skills and networks, but the extent to which these resources can be utilised depends on the quality of the domestic institutional and economic environment.

A distinction should also be made between voluntary return and return occurring through formal readmission procedures. In 2022, 2,805 BiH citizens were ordered to leave the EU, representing a decline of 27% compared with 2019. More generally, both return decisions and actual returns from the EU have displayed a declining trend compared with the higher levels observed during 2014 – 2015 (EC, 2023). Among registered readmission cases, voluntary returns dominate, accounting for almost 80% of returns in 2021. Germany is by far the most important country of return: more than 95% of assisted voluntary returnees in the reported data came from Germany, while Germany accounted for 57% of returns during 2013 – 2022. Returnees are also predominantly young, with persons below the age of 35 accounting for 88% of recorded cases (Efendic and Fere, 2023).

These administrative figures, however, should not be interpreted as measuring return migration as a whole. BiH has developed an institutional framework for dealing with forced return and readmission, including reintegration mechanisms at different administrative levels, but voluntary economic return remains much less systematically monitored and supported. Available comparative data indicate that the number of registered returnees in BiH during 2016 – 2021 was among the lowest in the region,

at around 1.5 per 1,000 inhabitants. At the same time, voluntary economic returns can occur almost entirely outside formal institutional arrangements and therefore remain largely invisible in administrative statistics.

The developmental potential of return migration deserves particular attention. Evidence suggests that former emigrants exhibit higher levels of entrepreneurial activity than the population average, potentially reflecting skills, savings, professional experience, and networks accumulated abroad (Efendic, 2025). Qualitative evidence also identifies emerging cases of economically motivated return in which migrants establish businesses in BiH, relocate existing activities from abroad or develop transnational business models combining knowledge and markets abroad with local labour and other resources. Halilovich and Efendic (2021), for example, document cases of long-term migrants returning after decades abroad because they perceived viable economic opportunities in BiH, rather than returning exclusively for family or emotional reasons. Such cases are important because they suggest that return should not be viewed solely as the final stage of a migration episode but can also represent a mechanism for transferring financial, human and social capital back to the country of origin.

At the same time, the developmental potential of return is heterogeneous. Evidence on the long-term consequences of conflict suggests that former economic migrants may possess greater developmental potential upon return than individuals whose original migration was forced by war, reflecting the persistent effects of conflict exposure on educational and economic outcomes (Efendic et al., 2022). This reinforces the need to distinguish between different categories of returnees rather than treating return migration as a homogeneous phenomenon.

Finally, return migration increasingly overlaps with temporary and circular mobility. Some BiH citizens work abroad for part of the year and return regularly, while others maintain employment, households and social relationships simultaneously across BiH and destination countries. In neighbouring and geographically close labour markets, the distinction between emigration and return may consequently become blurred. Rather than representing a single movement from origin to destination followed by a definitive return, contemporary migration may involve repeated mobility over extended periods.

These developments point to a gradual transformation of Bosnia and Herzegovina's position within European and regional migration systems. BiH remains predominantly a country of emigration and continues to experience substantial net population losses. However, permanent emigration increasingly coexists with voluntary and forced return, temporary and circular migration, transnational economic activity, transit migration and, more recently, immigration of foreign workers.

Return migration represents a potentially important positive component of this increasingly complex system, particularly when returnees bring skills, entrepreneurial experience, financial resources, and international networks. Its longer-term contribution, however, depends critically on the capacity of the domestic economy and institutions to create conditions in which return is both economically viable and sustainable.

Conclusion

Migration has been a persistent feature of the demographic, economic and social development of Bosnia and Herzegovina, although its scale, direction and underlying drivers have changed considerably over time. Post-WWII migration was predominantly economically motivated and contributed to the establishment of sizeable migrant communities abroad. The 1992 – 1995 war represented a fundamental break, generating unprecedented forced international migration and internal displacement, while the immediate post-war period was characterised by large-scale repatriation and return. These successive migration waves created extensive diaspora networks that continue to influence contemporary migration patterns.

During the last two decades, economically motivated emigration has again become dominant, with a particularly strong acceleration during the 2010s. Recent migration cannot, however, be explained simply by unemployment, or household income, but broader socio-economic environment including political and institutional dissatisfaction and broader perceptions of future prospects all influence migration decisions. At the same time, growing demand for labour in EU economies has strengthened external pull factors, while visa liberalisation, improved transport connections and established diaspora networks have made migration more accessible and predictable (Cicic, 2019).

The demographic consequences are particularly significant. Substantial net emigration has coincided with negative natural population growth and population ageing, with migration losses especially pronounced among younger and working-age cohorts. Moreover, the large share of migrants with vocational qualifications demonstrates that the challenge extends beyond the frequently emphasised brain drain. Contemporary emigration affects the broader supply of labour and skills and therefore has potentially important long-term consequences for the country's demographic and economic development (Leitner, 2021).

Migration between BiH and other Balkan countries remains an important part of this process. Croatia, Serbia, Slovenia, and Montenegro are particularly significant because of geographical proximity, common or closely related languages, historical connections and established

social networks. Croatia and Slovenia have become especially important labour-market destinations, while temporary and seasonal movements within the region demonstrate that contemporary migration cannot be understood exclusively as permanent relocation.

Indeed, one of the main recent changes has been the increasing diversity of migration. Permanent emigration now coexists with temporary and seasonal employment, circular mobility and return migration. Although evidence on return remains limited, returnees can potentially transfer skills, experience, financial resources, and international networks acquired abroad. At the same time, difficulties in labour-market reintegration and dissatisfaction with domestic institutions can limit the sustainability and developmental effects of return.

Overall, BiH remains predominantly a country of emigration and continues to experience substantial population losses. However, its migration profile is becoming increasingly complex, combining permanent emigration with temporary and circular mobility, return, transit migration, and emerging immigration of foreign workers. These developments suggest that migration policy should extend beyond attempts to reduce emigration and increasingly focus on managing mobility, strengthening diaspora connections, facilitating sustainable return, and creating conditions in which the knowledge, skills and resources generated through migration can contribute to the country's development.

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Concluding Remarks: The Shifting Paradigms of Balkan Migration

Daniela Bobeva

What does “Balkan migration” mean? In this book, the concept is understood in a broad sense, referring to the movement of people from, within, and between the countries of the region, as well as movements to destinations both within and beyond the region, encompassing the diverse forms that such mobility may take. In the academic literature and in political discourse, however, Balkan migration has for decades predominantly been understood as a symbol of mass emigration, driven by persistent political and ethnic conflicts, as well as by the inability of local economies and societies to retain their populations.

Migration has become a major factor contributing to population decline, reaching the level of a demographic crisis in most countries of the region. The combined population of the countries currently stands at 141.65 million, with Türkiye accounting for 60.2% of the total. Some 10.24 million people born in the Balkan countries live in the European Union, excluding citizens of the EU member states in the region who continue to reside in their countries of origin. If these populations are included, the figure rises to 49.11 million, equivalent to approximately 10% of the EU population. If the second generation of the so-called *Gastarbeiter* is also taken into account, this estimate could be considerably higher. Clearly, Balkan migration has left a significant imprint on the population of the EU, its labour market, economy, and culture.

The positive effects of migration on the region, however, have been significantly overstated. Remittances, as well as the transferability of pension rights and social benefits, cannot compensate for the enormous loss of population. Throughout this book, the authors emphasize the principal negative effects of mass emigration over the preceding decades: population ageing, regional depopulation, labour shortages, and the loss of talent, young people, and highly educated citizens. The depth

and seriousness of this problem may place it second only to the armed conflicts that affected the Balkans. The migration of the 1990s constituted a demographic, intellectual, and economic disaster for a large part of the countries in the region and for the region as a whole. It may help explain, among other factors, the region's technological lag and its difficulties in regaining competitiveness.

The provision of privileged access to education and residence for ethnic minorities abroad failed to function as an effective compensatory mechanism, as these opportunities were extensively used as a transit mechanism for onward migration to Western European countries.

Confronted with declining and ageing populations and increasingly tight labour markets, many countries have gradually shifted from emigration to immigration. An important role in this transition has also been played by migration fatigue and the declining potential for emigration resulting from population contraction and the convergence of income levels with those prevailing in destination countries.

A positive net migration balance is one of the most recent and interesting developments in Balkan migration. At the end of the Cold War, Greece and Türkiye received very large migration inflows, which subsequently subsided, although both countries have remained net recipients of population. In Bulgaria, the net migration balance became positive in 2020, and in Romania in 2022. In Serbia, the dissolution of Yugoslavia and the subsequent population movements also generated substantial inflows.

One of the factors underlying this new migration phenomenon is the behaviour of Balkan diasporas in destination countries. Despite their high degree of integration into their host societies, each country maintains a diaspora abroad that continues to play a role in the country of origin through electoral participation, remittances, investment in local real estate markets, and other forms of engagement. This continuing connection between migrants and their countries and communities of origin reflects the Balkan cultural tradition of strong and enduring ties to family and local communities across generations. Diasporas are dynamic population formations whose behaviour affects not only host societies but also constitutes a reservoir of return migration, making them one of the important factors contributing to the emergence of a positive migration balance.

One of the most important new trends in Balkan migration is the expansion of return migration, primarily from Western Europe and the United Kingdom. While Greece and Türkiye have a long history of return migration associated with their first major waves of emigration, Bulgaria, Romania, Serbia, and, to a more limited extent, other Balkan countries are now experiencing increasing return migration. This process intensified particularly during the COVID-19 pandemic. Although some countries

have recently introduced programmes aimed at encouraging the return of young and talented citizens, return migration is largely driven by a broad range of push and pull factors.

The sustainability of this process remains uncertain, given that the attractiveness of countries of origin varies considerably over time. The Greek crisis and the migration movements that followed provide a particularly illustrative example. At the same time, some return migrants develop patterns of circular migration, maintaining mobility between countries rather than permanently resettling in their countries of origin.

Changes in migration patterns in the Balkan countries and in the region as a whole are not merely the result of population loss and the accumulated imbalances that emerged after the end of the Cold War. Over the past two decades, migration patterns have evolved in the context of successive migration crises, including the Syrian and Ukrainian crises, as well as economic crises such as the global financial crisis, the Greek crisis, and the COVID-19 crisis. These crises have generated substantial changes in regional migration patterns. They have revitalised diasporas while also bringing large new groups of people into a region that has traditionally been regarded primarily as a transit area. Increasingly, however, a significant proportion of these migrants have begun to settle in the region, not only as a result of necessity but also by choice.

Factors such as asylum, security and border control, and security, more broadly, are exerting an increasingly important influence on migration patterns in the Balkans. The region's geographical position at the crossroads of Europe, and its location along major migration corridors connecting areas affected by conflict and instability, are particularly significant. External migration pressure on the Balkan countries, together with their international obligations, represents one of the most serious challenges facing both governments and societies. While governments have developed substantial capacities to manage large, unpredictable, and at times difficult-to-control migration flows, public attitudes towards migrants have remained predominantly sceptical in most countries.

The crises described above have affected the Balkan countries unevenly. Türkiye has faced the greatest pressure, having received the largest share of Syrian refugees, followed by Greece and Bulgaria. During the Ukrainian refugee crisis, Romania and Bulgaria received among the largest numbers of people seeking protection in the region.

As they become immigration countries, the Balkan states risk repeating the mistakes made by other countries by underestimating the importance of integration policies and measures. One reason is that migration is still frequently perceived as a temporary phenomenon and primarily as a means of "filling labour market gaps." The recent migration crises have also revealed substantial differences in public and policy attitudes towards different forms of immigration.

Despite the fact that all these countries have long histories of emigration and might therefore be expected to demonstrate relatively tolerant attitudes towards migrants, some have already witnessed the emergence of far-right political movements opposed to immigration.

One of the most important changes in migration in the Balkans is the increasingly active and, in many cases, state-supported recruitment and admission of labour migrants. All countries in the region have introduced policies intended to make these movements more manageable and to address one of the major negative consequences of past emigration: the emergence of substantial labour shortages. Labour market shortages exert upward pressure on wages, which, in turn, makes these labour markets increasingly attractive to workers from countries with lower wage levels.

Labour migration legislation has been gradually but consistently amended to facilitate access and enable longer periods of residence. The most favourable arrangements are generally those applicable to seasonal workers. Across the region, the main sectors employing foreign labour are tourism, services, and construction. Recruitment has predominantly focused on the low-skilled segment of the labour market. A major challenge, however, is the insufficient promotion of the recruitment of highly skilled workers and workers for industrial sectors.

With regard to the countries of origin of the new labour force entering the region, these are overwhelmingly located in Asia and other distant source regions. Each country has a specific composition of source countries, shaped in part by language skills and cultural proximity. Among the more distant sources are workers from Nepal, Sri Lanka, and Bangladesh in Romania; Uzbekistan and Kyrgyzstan in Bulgaria; and Russia, China, and India in Serbia.

Overall, the region is characterised by a broadening of legal migration channels, the digitalisation of recruitment processes, and an expansion of both the range of occupations and the geographical sources of migrant labour. Private recruitment agencies play a highly active role throughout the region, whereas government-led labour recruitment programmes remain relatively limited.

Intra-Regional Migration

Migration between the countries located in the Balkans constitutes an important component of the overall migration patterns of the region. It reflects the accumulated historical roots of migration but, under contemporary conditions, is increasingly shaped by both external and internal challenges. External drivers include large-scale migration waves

originating from conflict-affected areas, while internal drivers include population decline and growing demand for labour.

Intensive travel and population movements between the countries are evident, while labour mobility remains comparatively limited, with Türkiye playing a leading role in this process. As the largest economy and the most populous country in the region, Türkiye occupies a particularly important position on the map of intra-regional migration, followed by Greece, which has played a particularly important historical role during the transition to market economies. Albanians constitute the largest foreign population group in Greece, while Bulgarians constitute one of the largest diaspora groups in Türkiye. Turkish citizens are the third-largest group of registered foreign workers in Romania, the second-largest country of origin of third-country labour migrants in Bulgaria, and the third-largest group of foreigners in Serbia. In other words, Türkiye has in recent years shifted from being primarily a destination for migrants from the region to becoming an important source of labour migrants for Balkan economies, as well as a source of new settlement in the Balkans.

One of the distinctive features of migration processes in the region is the exceptionally dynamic pattern of changes in citizenship. Significant numbers of people acquire, renounce, and subsequently reacquire citizenship across the countries of the region.

The rapid development of real estate markets is another factor contributing to the growth of cross-border migration, as illustrated by the movement of Bulgarians to Greece, Romanians to Bulgaria, and similar patterns elsewhere in the region.

EU membership and the free movement of people have contributed to the intensification of migration between EU member states. At the same time, as income levels converge, the economic incentives underlying labour migration become progressively weaker.

Prospects for Balkan Migration

The prospects for Balkan migration remain challenging. Given the demographic situation in the countries examined, the potential for future emigration from the region is relatively limited. External migration waves have partly offset demographic losses, although the period of the Syrian crisis also revealed considerable shortcomings and policy failures in managing these flows. The role of national security is becoming increasingly important, while the region’s proximity to areas affected by conflict, in a world facing a new geopolitical confrontation, is likely to generate further migration pressures.

Future migration movements are unlikely to be driven predominantly by economic factors. Rather, they may once again be increasingly associated with ethnicity, security, armed conflict, and geopolitical instability. The region will continue to constitute a front-line region facing significant migration pressures, while simultaneously evolving into an increasingly immigration-oriented society characterised by long-term settlement and growing diversity.

Despite the shift towards positive net migration in several countries, emigration of highly skilled people continues, including doctors, IT specialists, young professionals, talented individuals, and students. Although this migration is no longer as massive as in the past, given the unfavourable demographic balance of the countries concerned, it may have a significant negative impact – not so much on the overall size of the population as on its capacity for economic growth and long-term prosperity. The absence of effective policies for attracting and retaining talent, both domestic and foreign, is likely to continue to constrain the development of the region.

With regard to climate change and the potential risks of climate-induced migration, the region can generally be assessed as a relatively low-risk area. The countries vary considerably in their levels of climate vulnerability, but most of them – with the exception of Serbia and North Macedonia – fall within the low or moderate categories of the Climate Vulnerability Index: Greece (0.356), Bulgaria (0.361), Bosnia and Herzegovina (0.380), Türkiye (0.396), and Romania (0.398). This suggests that the region may increasingly become a potential destination for climate migrants rather than a major source of climate-induced migration.

Looking ahead, an important question concerns the sustainability of the new pattern of immigration and whether these countries might eventually return to their traditional emigration model. Although the Balkan region currently appears less volatile than in the past, and inter-state ethnic conflicts remain largely latent, these tensions could be reignited by external or internal shocks.

At the same time, risks to the seemingly stable migration situation may also arise from the behaviour and integration of new migrants and emerging diasporas within the Balkan countries. Nevertheless, judging from the experience of Greece, a return to a predominantly emigration-oriented model appears relatively unlikely.

The recruitment and admission of foreign labour over the past decade cannot, by any means, compensate for the population losses experienced since the early 1990s. Nevertheless, return migration, as a broader regional trend, brings substantial benefits and is likely to continue to increase.

The Western Balkan route has made South-Eastern Europe a key space for transit, migration control, humanitarian response, and border management (Frontex, 2025). Recent Frontex data show that mobility along the Western Balkan route is highly sensitive to enforcement practices, cooperation with neighbouring states, and EU-level priorities concerning border management (Frontex, 2025). The region is likely to remain a transit area for a significant proportion of displaced people, although an increasing share of them may ultimately settle in the region.

Migration will remain an important factor shaping the development of the region, affecting demography, labour markets, investment, and economic development. At the same time, the countries of the Balkans are not yet sufficiently prepared to address the challenges associated with the integration of new communities and the emergence and consolidation of new diasporas within their societies.

CHANGING
BALKAN
MIGRATION

TRENDS, DRIVERS AND PERSPECTIVES
IN A TRANSFORMING REGION

Bulgarian
First Edition

Reviewers *Veselin Minchev, Audra Sipavichenie*

Editor *Daniela Bobeva*

Format 70x100/16
Printed Sheets 12,38

Printing-office of the Prof. Marin Drinov Publishing House
of Bulgarian Academy of Sciences
1113 Sofia, Acad. Georgi Bonchev Str, bl. 5

www.press.bas.bg

ISBN 978-619-245-673-3

www.press.bas.bg
9 786192 456733