Between War and Return

Scenarios for the Future of Ukraine and Its Refugees

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List of abbreviations

BTPs	beneficiaries of temporary protection
EUAA	European Union Agency for Asylum
FDI	foreign direct investment
GDP	gross domestic product
GRP	gross regional product
IDPs	internally displaced persons
IOM	International Organization for Migration
OECD	Organisation for Economic Co-operation and Development
TP	temporary protection
TPD	Temporary Protection Directive
UNHCR	United Nations High Commissioner for Refugees

Executive summary

This report presents four scenarios for the future of Ukraine with a particular focus on migration dynamics. Outlining these scenarios can help Dutch and other European policymakers to navigate the uncertain future of Ukrainian refugees abroad. In two of the scenarios, the Russo-Ukrainian War continues, with either the Ukrainian or the Russian side making significant territorial gains. The last two scenarios posit a future in which the war comes to an end through a ceasefire along current lines, followed by either limited or substantial economic recovery for Ukraine. The scenarios are created with a four-year timeline (April 2026-March 2030) in mind and have been informed by a scenario workshop which was held in October 2025 at the Clingendael Institute.

Following the scenario workshop, the research team added a quantitative dimension to the scenarios by estimating the likely migration flows that would follow therefrom. For this, data was gathered on forced migration and on return. Displacement patterns were identified by analysing: (a) the forced migration that resulted from Russia's 2014 annexation of Crimea and military intervention in the Donbas, and (b) displacement patterns following the invasion of 2022 and the subsequent occupation of parts of Ukraine. Return migration, on the other hand, was estimated mainly based on intention surveys. The patterns that emerged out of this data analysis were subsequently projected onto the populations in question; namely, Ukrainians residing on Ukrainian territory that is still controlled by Kyiv and Ukrainian refugees abroad, primarily in the EU.

In the first scenario, the war of attrition continues for the next four years with Ukraine managing to make significant territorial gains. As a result, Ukraine manages to reconquer parts of the east and south of the country, although not the big cities. Meanwhile, as the war continues, economic recovery remains limited. This scenario will lead to very little new displacement, while significant numbers of displaced Ukrainians domestically and abroad return to their homes. The total number of people in need of protection within the EU is estimated to decline from 4.3 million to 2.4-2.7 million.

Scenario 2 posits a continuation of the war of attrition, but with significant Russian territorial gains. Russian forces recapture the entire Donbas region and the city of Sumy, while moving within shelling and drone-attack distance from major cities like Kharkiv, Dnipro, and Zaporizhzhia. Meanwhile, Ukrainian society undergoes a further militarisation and political instability, and the Ukrainian economy shrinks to below 2022 levels. This scenario leads to large new displacements of Ukrainians, with 7.1 to 11.7 million more Ukrainians fleeing to the EU. As a result, the number of Ukrainians requiring protection in the EU will increase to 9.3-13.9 million, while another 1.6 million Ukrainian refugees transition to residence status.

The third scenario posits the reaching of a volatile and porous ceasefire, with fighting and Russian intrusions into Ukrainian airspace dropping to low levels along an effectively frozen frontline, followed by a disappointing economic recovery for Ukraine. The ceasefire agreement contains neither significant security guarantees for Kyiv, nor proper monitoring mechanisms. Thereby, the threat of renewed Russian attacks persists. Meanwhile, Ukrainian politics takes an authoritarian turn, foreclosing a path to EU membership, while Russia expands its hybrid warfare against the country. As a result of these developments, the Ukrainian economy stagnates. This scenario leads to limited further displacement, with only an estimated 69,500 additional Ukrainians coming to the EU for protection. About half a million Ukrainians, however, are expected to come to Europe through family reunification, as soldiers are demobilised and martial law is gradually lifted. Meanwhile, the disappointing economic and political situation in Ukraine leads to limited return migration (circa 370,000), with more than 2.4 million Ukrainians (not counting the nearly 500.000 family reunifications, at least a part of which will also require temporary protection) remaining in need of protection and about 1.6 million Ukrainians transitioning to residency status in the EU.

Finally, in scenario 4, a robust ceasefire is reached approximately along the current frontline, with Ukraine obtaining significant security guarantees from the US and its allies. A combination of robust security, political stability, and deep institutional reform resulting in improved governance creates the foundations for a shift to substantial economic growth. In this scenario, there is no new displacement of Ukrainians nor forced emigration out of Ukraine, although there is substantial family reunification as around 300,000 mostly male Ukrainians move to reunite with their families in the EU. Meanwhile, about 2.5 million Ukrainians under temporary protection in the EU return to their home country, while around one million former beneficiaries of temporary protection (BTPs) remain in the EU in need of support, and another 750,000 transition to residency status.

The report concludes that in all scenarios a large number of Ukrainian refugees – including those in continued need of protection or in need of an alternative status after TPD ends – will likely remain in the EU for many years, if not permanently. Moreover, a scenario in which more Ukrainian refugees flee to Europe is realistic, and the EU needs to prepare for such an eventuality. Furthermore, an end to the active fighting through a ceasefire is an insufficient condition for Ukrainian refugees to return in large numbers. Once the war ends, the prospects for refugee return will also be determined by the nature of the ceasefire agreement and the robustness of Ukraine's resulting security, as well as by the substance of economic recovery and institutional reforms that will take place. This means that EU member states, including the Netherlands, need to start planning to facilitate the longer stay of Ukrainian refugees who cannot return in the near future, as well as to devise strategies for integrating those who are unable to return at all in the longer run.

Introduction

Russia's full-scale invasion of Ukraine in February 2022 not only led to the largest and most destructive war in Europe since World War II, but also led to the continent's biggest displacement crisis since that time. With the war entering its fifth year (the thirteenth year when counting since Russia's 2014 invasion) and Donald Trump's fervent diplomatic offensive producing few tangible results, the end of the fighting is still not in sight. At least an equal uncertainty exists about the future of displaced Ukrainians abroad. In order to help policymakers to deal with this fundamental uncertainty and to help them prepare for various possible futures, this report offers scenarios for the future of Ukraine with a particular focus on migration dynamics.

As such, this report is an exercise in *strategic foresight*, which is a systematic analysis of plausible futures. Because the future is fundamentally unpredictable, analysts and policymakers need to think in terms of multiple possible futures. Narrative accounts of these imagined futures are called *scenarios*. By providing insight into a range of possible futures, scenarios can help policymakers to prepare for the future, ideally creating a "futures-proof" policy – a policy that anticipates multiple future scenarios.[1]

This report is part of a multi-year research project on the Ukrainian refugee crisis that the Clingendael Institute has been conducting for the Dutch Ministry of Justice and Security for the past three and a half years. Since November 2022, Clingendael has published regular reports analysing the refugee situation within Ukraine, across the member states of the European Union, and in the Netherlands. The aim of these reports has been to assess the likelihood of further (onward) refugee flows and to evaluate the prospects for refugees returning to Ukraine.

1 See Koen Aartsma, Liam Klein, and Chiara Schrader, *Geopolitiek changement op het wereldtoneel: Een foresightstudie*, Clingendael Strategische Monitor 2025-2030 (January 2025), 1-3.

Methodology

This report presents four scenarios for Ukraine's future, examining their potential impact on the internal and international displacement, residency, return, and family reunification of Ukrainians over the next four years – from April 2026 to March 2030. The four-year timeframe was chosen based on the prospect that the Temporary Protection Directive (TPD) could well end in March 2027, after which Ukrainian refugees in the Netherlands would become eligible for a temporary transition document that is valid for three years.[2] Based on prior research, including the preliminary scenarios outlined in Clingendael's December 2024 report on the refugee crisis (in Dutch),[3] the research team developed four initial scenario outlines.

These scenario outlines were divided into two scenarios in which the war continues with significant intensity and another two in which a ceasefire is reached. The ongoing war scenarios were further differentiated based on the relative battlefield fortunes of the Russian and Ukrainian armed forces. In the ceasefire scenarios, the key differentiating factor is the degree of economic recovery following the cessation of armed conflict, as this is expected to have the most direct impact on migration dynamics. The underlying assumption is that a substantial economic recovery is highly unlikely – if not impossible – while intense fighting continues.

These scenario outlines were subsequently presented to experts and policymakers in a scenario workshop at the Clingendael Institute on 27 October 2025. In the workshop, participants provided valuable input to help the research team develop the scenario outlines into four detailed and distinct narrative scenarios, which are included in this report.

Finally, the migration dynamics of each of the four narrative scenarios were analysed. To begin with, separate approaches were developed for analysing forced migration and return migration, as the databases for both types of migration are very different. For forced migration, key patterns of displacement

2 See Rijksoverheid, '[Transitiedocument beschikbaar na afloop RTB voor vluchtelingen uit Oekraïne](#)', 28 November 2025.

3 Anouk Pronk, Huub Verbaten, Kaspar Pucek, Bob Deen, Monika Sie Dhian Ho, and Zara Remmers, *De strijd om Oekraïne en zijn ontheemden: Duivelse dilemma's op komst*, Clingendael Report (December 2024), 25-29.

are identified by analysing displacements following Russia's 2014 annexation of Crimea and its military intervention in the Donbas (Ukraine's most eastern provinces of Luhansk and Donetsk), as well as its 2022 full-scale invasion.[4] Expected levels of return migration, on the other hand, are derived from intention surveys. Second, these patterns are, where possible, updated with the latest available data. And third, the corrected patterns are applied to the relevant populations in question, meaning the remaining people in government-controlled Ukraine, the Ukrainians with temporary protection in the EU, and, where applicable, displaced Ukrainians in other host countries.

A note on the data

Whereas the pre-war data situation (notably Ukrainian population statistics) was flawed, while the State Statistics Service of Ukraine ceased generating statistics following Russia's full-scale invasion of Ukraine in February 2022, alternative and new data has become available based on registration procedures in EU refugee host countries as well as increasingly good quality surveys. Combining the different data sources facilitates compensating statistical gaps and correcting imperfect data. Notably:

- Ukrainian population statistics are flawed because the last census in the country was conducted in 2001.[5] Since then, all population data is based on estimates. In addition, high internal and international (forced) migration distorts all population data. Furthermore, data from frontline areas and cities unfortunately often comes solely from local sources, the reliability of which cannot be independently established.
- Most baseline population statistics applied below reflect the pre-war situation. Therefore, the population that has already left Ukraine – around 6 million people, or 15.38% of the pre-war population – needs to be deducted from all totals. However, there is also a recent generic estimate of the total population (30 million) that will be applied where appropriate.[6]
- For the most part, only the population of the territory still controlled by the Ukrainian government is considered, because there is no reliable post-2022 data on the occupied territories.

4 Frank Düvell, 'Scenarios of War and Forced Migration From Ukraine: How many more Ukrainians could flee if Russia wins?', Prague Process, 15 May 2024.

5 Ella Libanova, 'Ukraine's Demography in the Second Year of the Full-Fledged War', Wilson Center, Kennan Institute, Focus Ukraine, 27 June 2023.

6 Libanova, 'Ukraine's Demography'.

- Ukrainians in some largely Russian-speaking regions in the east have responded differently to the Russian occupation than in the largely Ukrainian-speaking oblasts further to the west (e.g., Kherson) and in the centre of the country. As a result, the percentage of people fleeing from Russian occupation will be high in oblasts that, according to the latest census (2001), identified themselves as Ukrainian (see Map 1).
- Furthermore, the part of the population that has already left Ukraine displays different characteristics from those who are still in Ukraine.[7] Many of those who stayed behind belong to the less mobile group: notably the elderly, people from lower social classes, less well educated people, people with disabilities, and people in isolated villages.[8] For example, in 2023, approximately 45% of the remaining population (14.1 million) fell within the 45-90 age group, which so far has been only half as likely to migrate as the 18-44-year olds.[9]
- Also, the gender and family composition of the population has changed due to the disproportionally high level of women migrating with their children. Therefore, there are now proportionally more men in the country, who are often separated from their families.[10] Strictly speaking, the migration pattern of women with children fleeing under conditions of war cannot thus be uncritically applied to the men left behind. Instead, it can be assumed that for two reasons the propensity of men fleeing the country in case it falls under Russian control might be higher than that of women: First, they are more likely to join their families who are already abroad. And second, they are more likely to be in need of escaping expected Russian repression, persecution, and reprisals.[11]

For these reasons, it is necessary to work with migration intention surveys, triangulations, estimates, alternative methods such as combining intentions with economic forecasts and adjusting intentions to oblast of origin conditions, and – in some cases – even guesses or presumptions.

7 Those who have left are 'predominantly aged between 18 to 44 years (71 %)', with 79% being female. Their share of the population was 40% in 2021 (17.2 million) and they were almost twice as likely to migrate abroad than the older age group. See EUAA, 'Survey with Arriving Migrants from Ukraine', 9 October 2023.

8 Oksana Mikheieva and Irina Kuznetsova, *Internally displaced and immobile people in Ukraine between 2014 and 2022: Older age and disabilities as factors of vulnerability*, IOM (2023).

9 'Population of Ukraine 2023', PopulationPyramid.net, accessed in November 2025.

10 Of all Ukrainian refugees in the EU, 37.6% are male, only 20% are adult men (about 862,000 while the majority are female); hence, there are still 9.28 million men in the age group 18-60. See Eurostat, 'Temporary protection for persons fleeing Ukraine - monthly statistics', 4 March 2026.

11 See Andrew S. Bowen and Matthew C. Weed, *War Crimes in Ukraine*, Congressional Research Service (October 2020).

The Ukrainian refugee crisis at the end of 2025

Large-scale wars are transformative for the warring societies in question, and the Russo-Ukrainian War is no exception to this. The war against Russia is transforming Ukraine's economy, geography, demographics, politics, and society.[12] Key features of this change are the country's demographic decline, forced international migration, the demographic and economic shift from the east to the west of the country, the decline of traditional (often Soviet-era) industries and employment models (for example, mining and metallurgy), and the rise of new industries (such as IT and the service sector). These changes seem to be largely irreversible and create substantial uncertainty for Ukraine's future prosperity and stability, thereby impacting migration aspirations.

This chapter sketches the current situation of the Ukrainian refugee crisis, which the report will use as a starting point for developing the migration scenarios.

- First, this chapter establishes the size of Ukraine's pre-war and wartime population, including the distribution within *oblasts* (provinces), as this is the basis for calculating future migration.
- Second, the chapter elaborates on the development of migration intentions among the people still in Ukraine. This indicates, within limits, not only the proportion of people considering migration under current conditions but also implies how many of those who in the past held migration aspirations have already left the country which shapes the size of the population potentially migrating in the future.
- Third, this chapter analyses how many Ukrainians with which characteristics and from which provinces have fled the country. This sheds additional light on those who are still in the country and on their likelihood to resort to migration in response to war, occupation, or improving/deteriorating living conditions.

12 Vladyslava Troian, Nataliia Kondratenko, Volodymyr Velychko, Roman Viatkin, and Anton Sas, 'Analysis of Socio-Economic Conditions of Ukraine's Regions in the Context of Transformational Change: Challenges and Prospects', IOP Conference series: Earth and Environmental Science (2025).

- Fourth, the chapter analyses the return migration of Ukrainian refugees back to Ukraine, shedding light on future prospects for return.
- Finally, the chapter summarises the research findings with regard to the migration aspirations of Ukrainians already in the EU.

The population of Ukraine

By the end of 2025, Russian forces still occupied 19.25% of Ukraine, an increase of only 1.23% since January 2023.[13] The war has not only led to a loss of territory for Ukraine, but also to a profound demographic loss – mostly from migration rather than combat deaths or civilian casualties. Prior to Russia's full-scale invasion, Ukraine's population was estimated at 41 million.[14] By the end of 2025, only an estimated 31 million people were still living in government-controlled areas of the country,[15] while an estimated 37.6 million people were thought to be residing within Ukraine's 1991 borders.[16] Moreover, by January 2026, 5.9 million refugees – 16.9% of the pre-war population (2021) – were recorded as being outside of the country.[17]

13 'Russia occupied more than 4,000 sq km of Ukrainian territory in 2025 – military analysts', Ukrainska Pravda, 1 January 2026; DeepStateUA, '4336 kv km ukrainskoi terytorii bulo okupovano za 2025 rik', Telegram, 1 January 2026, 19:40.

14 In 2010, the population stood at an estimated 46 million, including Crimea and the entire Donbas. See State Statistics Service of Ukraine, 'Demographic situation in Ukraine as of January-October 2010', All-Ukrainian population census, n.d. In 2021, there were around 285,000 regular immigrants, including 75,000 international students, many also working, including 31,299 work permit holders, western embassy and other staff, and supposedly more who were irregular. See Vatican, 'Country profiles: Ukraine', Integral Human Development, accessed in November 2025; IOM, *Pathways for Regular Migration: Perception of Immigrant Workers and Recovery in Ukraine* (July 2024).

15 Alexander Manuilov, 'Ni 50, ni 37 milioniv', *Forbes*, 24 November 2025.

16 Serhii Shevchuk, 'Ukraini potribno bude zaluchaty minimum 300 000 mihrantiv shchoroku', *Forbes*, 25 September 2023.

17 UNHCR, 'Ukraine Refugee Situation', accessed in February 2026.

Contrary to what one might expect, those Ukrainians who are hit the hardest by adverse and deteriorating conditions – such as the elderly and the disabled, their care providers, and the poor, often in frontline communities – are typically the least mobile.[18] The most vulnerable, possibly around 900,000,[19] are likely to remain trapped in increasingly harsh conditions.

Demographic forecasts show that Ukraine's population will inevitably decline further as a result of the war. Depending on whether a more pessimistic or optimistic scenario is chosen, the population of Ukraine could further shrink to 24-35 million by 2050.[20] According to the leading Ukrainian demographer Ella Libanova, large-scale labour immigration in the order of 300,000 people annually would be necessary just to keep Ukraine's population stable at around 30 million, given the low birth and high death rates.[21] Meanwhile, according to the Ukrainian Ministry of Economy and the International Labour Organization (ILO), Ukraine would need 4.5 and 8.6 million immigrants, respectively, over a period of ten years in order for Kyiv to be able to meet its economic growth objectives.[22]

18 'What Ukrainians need to survive the toughest winter yet', International Rescue Committee, 8 November 2023.

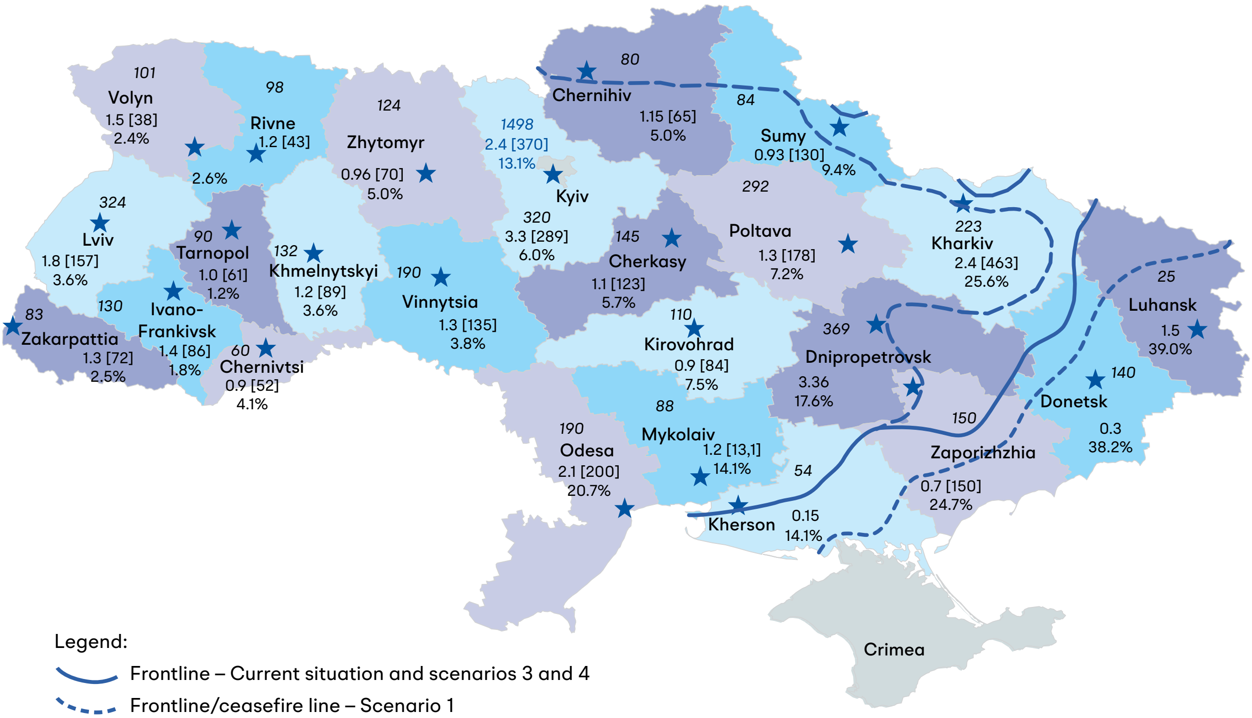
19 Laurentina Jora, 'Ukrainians face harsh winter amid ongoing attacks on energy infrastructure', World Vision, 23 December 2024.

20 Oleksandr Shchedrinkskyi, 'Demographic crisis in Ukraine: scale, causes, and forecasts', The Ukrainian Review, 6 December 2025.

21 Shevchuk, 'Ukraini potribno bude zaluchaty'.

22 IOM, *Pathways for Regular Migration*; Romania Bandura, 'Ukraine's Future Rests in its People', Center for Strategic and International Studies, 14 February 2025.

Map 1 Ukraine, oblasts, oblasts' gross regional product (GRP) per capita rounded off in 100,000s UAH (2021, corrected by the impact of war and estimated for 2025) (in italics),[23] the population in millions in 2025,[24] the internally displaced persons (IDPs) per oblast, in thousands [in brackets],[25] the percentage of ethnic Russians (2001 census),[26] and the (frozen) frontline of the war in the different scenarios



Legend:
Frontline – Current situation and scenarios 3 and 4
Frontline/ceasefire line – Scenario 1
Frontline/ceasefire line – Scenario 2
Oblast capitals

23 State Statistics Service of Ukraine, 'Data bank', accessed in December 2025. GRP data from 2021 – the last year for which data is available – is used and corrected by +10% for western and central regions, -30% for eastern regions, and -50% for occupied territory. This is nothing more than a rough indicator of GRP changes extrapolated from a range of papers and articles as no reliable data is available. See Kappner et al., 'Estimating the short-term impact'; Troian et al., 'Analysis of Socio-Economic Conditions'.

24 The population data is mainly from the IOM (IOM Ukraine, *Oblast Profiles: General Population Survey* (October 2025)), except for (the government-controlled parts of) the provinces of Donetsk (Olha Hlushchenko, 'About 318,000 civilians remain in Donetsk Oblast, evacuation ongoing', Ukrainska Pravda, 6 December 2024), Kherson (Yeva Vasylevska, 'It has become known how many people remain on the right bank of Kherson Oblast', MOST, 31 October 2025), Khmelnytskyi (Khmelnytskyi Regional State (Military) Administration, *Khmelnytskyi Region investment passport* (n.d.)), Luhansk (V.A. Bezverbnyi, E.A. Lukashenko, and E.A. Bekineev, 'Demograficheskaia situatsiia v Donetskoi i Luganskoi narodnykh respublikakh', *DEMIS. Demograficheskie issledovaniia* 4, no. 4 (2024): 167-186), Zakarpattia (Interreg NEXT Poland – Ukraine 2021-2027, 'Get to know the PL-UA Programme regions – Zakarpattya Oblast', 29 August 2025), and Zaporizhzhia (City Development Institute of Zaporizhzhia and Zaporizhzhia City Council, *Investment Portfolio of Zaporizhzhia city territorial community* (n.d.)).

25 IOM, *Ukraine Internal Displacement Report: General Population Survey* (April 2025), 14.

26 State Statistics Committee of Ukraine, 'About number and composition population of UKRAINE by data All-Ukrainian population census' 2001 data', n.d.

Migration

Ukrainian refugees

Already prior to Russia's February 2022 full-scale invasion, approximately 6.1 million Ukrainian migrants were recorded abroad, with more than half residing in Russia.[27] Then, in 2022, 13.9 million Ukrainians were displaced, around half internally (7.14 million) and the other half internationally (6.8 million).[28] The total displacement in 2022 amounted to 36% of the total population or about 75% of the population of the provinces directly affected by fighting or occupation. Within 24 months, about 4.24 million displaced people had returned. Of the 3.69 million people still internally displaced (by October 2025),[29] 1.27 million resided in frontline regions.[30] In 2022-2023, 700,000 Ukrainians fled to non-EU countries (the US, Canada, the UK, and Turkey), around 11% of the total number of Ukrainians fleeing abroad during that period.[31] Globally, the United Nations High Commissioner for Refugees (UNHCR) recorded 5,898,159 Ukrainian refugees by January 2026 – of which 5,349,060 are in Europe (including Russia and Turkey) and 549,090 in non-European countries (excluding Russia).[32]

If one includes internally displaced persons (IDPs), around 10.5 million Ukrainians – or around 25% of the total pre-war population – are displaced.[33] At the end of 2025, there were about 4.33 million Ukrainians with a Temporary Protection

27 Data from 2020 by the IOM. Some 6% resided in the US, 1.4% in other countries in the Americas, 5.8% in Kazakhstan, 4.7% in Germany, 4.4% in Poland, 4% in Italy, 3.6% in Belarus, 2.2% in Czechia, 2.1% in Israel, and 2% in Uzbekistan. Hence, 65% went to eastern destinations and 45% to western destinations. See Migration Data Portal, 'Ukraine migration overview', 24 February 2024.

28 See IOM, 'Ukraine Displacement Tracking Matrix', accessed in November 2025.

29 See IOM, 'Ukraine Displacement Tracking Matrix'.

30 Kyiv, Chernihiv, Sumy, Poltava, Kharkiv, Dnipropetrovsk, and Mykolaiv.

31 Frank Düvell, 'Forced Migration from Ukraine: migrations scenario 2.0', Prague Process, 30 January 2024.

32 UNHCR, 'Ukraine Refugee Situation', accessed in January 2026. Russian data reported a 2023 estimate of 1.2 million Ukrainians categorised as in a 'refugee-like situation'. However, because the data has not been updated since then, it is no longer included in the official UNHCR data. Alternative sources suggest that there are less than one million – possibly 900,000 – Ukrainians in Russia as a consequence of the war. See Lidia Kuzemska, 'Politics of Distorted Numbers: How Russia is Counting Displaced Ukrainians and Why?', TRAFO - Blog for Transregional Research, 2 November 2023.

33 Due to statistical flaws, the above numbers are not completely consistent. Also, due to the statistical break in the UNHCR time series, pre and post-2025 data is not comparable.

status in the EU.[34] Additionally, 70,867 Ukrainians had applied for asylum during the years 2022-2025, with an annual approval rate ranging from 92% (2023) to 70% (2025).[35]

The largest number of Ukrainian refugees in Europe is to be found in Germany, which hosts 1.24 million (28.7% of the EU total), followed by 969,000 in Poland (22.4%), and 393,000 in Czechia (9.1%).[36] The Netherlands ranks seventh, hosting 135,000 Ukrainian beneficiaries of temporary protection (BTPs), or 3.1% of the total.[37] These distributional patterns will likely persist and shape future developments. A year-by-year breakdown shows that 80% of Ukrainian beneficiaries of temporary protection in the EU left their home country in 2022, 13% left in 2023, 6% in 2024, and just 1% in 2025.[38]

Of the total, 1,892,900 are adult women (44%) and 1,075,000 are adult men (25%).[39] The remaining 1,334,000 are minors,[40] of whom an estimated 859,000 are of school age. Of the adults, around 60% of BTPs are employed in the host

34 These statistics are not entirely accurate, as they are based in part on potentially inflated estimates. Not all countries register all Ukrainian refugees and there are national accounting differences that prevent simply adding up national figures. For example, France does not record accompanying minors. The total number of BTPs includes 1.6% of non-EU foreigners who were residing in Ukraine on a long-term basis. See Eurostat, 'Temporary protection for 4.33 million in November 2025', 12 January 2026. According to a report by the Centre for Economic Strategy, however, a notable proportion of the refugees – up to 29% – is not strictly in need of international protection and therefore represents 'quasi-labour migrants'. See Dariia Mykhailyshyna, Maksym Samoiliuk, and Mariia Tomilina, 'Refugees from Ukraine: Who are they how, many are there, and how to return them', Centre for Economic Strategy, 29 Augustus 2023.

35 In 2022, 8,600 Ukrainians applied for asylum. In 2023, 10,000 – with an approval rate of 92%. In 2024, 27,000, and, in 2025, 25,267 (approval rate 70%). See EUAA, *Asylum Report 2024* (June 2024); EUAA, *Latest Asylum Trends 2024: Annual Analysis* (March 2025); EUAA, *Latest Asylum trends 2025: Annual Analysis* (March 2026); Eurostat, 'First instance decisions on applications by type of decision, citizenship, age and sex – annual aggregated data', accessed in December 2025.

36 Eurostat, 'Temporary protection for 4.33 million'.

37 Government of the Netherlands, 'Long-term policy on asylum support for refugees from Ukraine', 1 December 2025.

38 EUAA, 'Situation in Ukraine and Displacement to the EU+: Trends, Drivers and Future Prospects', 5 September 2025.

39 Eurostat, 'Temporary protection decisions highest in 2 years', 10 November 2025. However, Eurostat does not provide age data for half of the Ukrainians. These data are thus based on an extrapolation.

40 UNHCR, *Education of Refugee Children and Youth from Ukraine: An analysis of major challenges and trends based on Multi-Sector Needs Assessment (MSNA) and other data* (June 2024).

countries.[41] Moreover, in 2019, before the full-scale invasion, 49,000 Ukrainian students were studying in the EU.[42] By 2024, we can estimate that this number had risen to 69,000, including around 20,000 BTPs.[43]

During the first three years of the war, the number of Ukrainians with a residence permit in the EU had increased by around 160,000 – from 1,468,569 in 2022 and 1,525,592 in 2023 to 1,629,348 by 2024.[44] These numbers included individuals who had switched from protection to residence status. However, the figures do not enable us to identify how many actually took advantage of this opportunity. The new EU recommendation on the expiry of temporary protection suggests facilitating transition from Temporary Protection (TP) status to a different residence status.[45] Therefore, a future increase in Ukrainian residence permit holders can be expected.

Since January 2023, the flow of internally displaced persons and of temporary protection seekers has stabilised.[46] The border crossings between Ukraine, on the one hand, and the EU and Moldova, on the other, oscillate around 70,000 exits and entries on a daily basis (daily reports,[47] adding up to 2.1 million border crossings per month between Ukraine and the EU (including Moldova)). Even Russia's 2025-2026 winter offensive has not changed this trend. A monthly average of 66,000 Ukrainians were granted temporary protection (TP) status in the EU.[48] But because during the same period the stock of TP beneficiaries only

41 Authors' calculation on the basis of OECD, *International Migration Outlook 2025* (November 2025), 63-64.

42 Ivana Katsarova and Samy Chahri, 'Russia's war on Ukraine: Ukrainian students in the EU', European Parliamentary Research Service (March 2022).

43 It is estimated that there were 115,000 Ukrainian students abroad. See Yegor Stadnyi, 'Student Migration to Western Universities: How Many Ukrainians Left between 2008 and 2023 - and Where', Vox Ukraine, 21 August 2025. In the past 60% were enrolled at EU universities. See Katsarova and Chahri, 'Russia's war on Ukraine'. Hence 69,000 are assumed to be in the EU.

44 Eurostat, 'All valid permits by reason, length of validity and citizenship on 31 December of each year', 19 November 2025. The date for 2025 is not yet available.

45 European Commission, 'Proposal for a Council Recommendation on a coordinated approach to the transition out of temporary protection for displaced persons from Ukraine', 4 June 2025.

46 See UNHCR, 'Ukraine Refugee Situation', accessed in January 2026.

47 Zahidnuy Kordon, Facebook, accessed in November 2025.

48 Eurostat, 'Decisions granting temporary protection by citizenship, age and sex – monthly data', Data Browser, accessed in December 2025.

rose by 410,000[49] – i.e., on average 12,000 net per month – it can be concluded that on average every month 54,000 also returned, including some who had left the EU for other destinations.

To determine the scope of transnational activities – understood as Ukrainians maintaining commitments or pursuing activities in both their home and host countries – it is also necessary to consider patterns of travel and work. This reflects a hybrid mode of engagement that lies between permanent settlement and return, and is therefore important for assessing future migration trajectories. Meanwhile, by November 2024, 59% of BTPs had not been back to Ukraine since their displacement,[50] whereas 21% went once, 17% went two to four times, and only 2% five times or more.[51] Of the visitors, 60% stayed for two weeks or less, whereas 11% stayed for longer than a month.[52] It was mostly people from Kyiv as well as central and western Ukraine who returned for visits, whereas people from eastern and southern Ukraine were much less likely to visit Ukraine. In addition, up until 2023, 18% of Ukrainians in the EU continued to work remotely for Ukrainian employers.[53] Regular return and remote working imply a significant level of transnational (economic) activities. It can be concluded that by 2025 most of the men and women who aspired to migrate and had the necessary capabilities had already done so.

With regard to the geographic origins of Ukrainian refugees in Europe, in 2024 an estimated 59% were from the eastern and southern macro region and 14% from Russian-occupied territories.[54] By 2025, there was a notable increase in the

49 Eurostat, 'Beneficiaries of temporary protection at the end of the month by citizenship, age and sex – monthly data', Data Browser, accessed in December 2025.

50 The EUAA survey has not been updated since.

51 EUAA, 'Survey of Arriving Migrants from Ukraine: Movements and Returns Report', 3 December 2024.

52 UNHCR Regional Bureau for Europe, *Displacement Patterns, Protection Risks and Needs of Refugees from Ukraine*, UNHCR (June 2024), 10.

53 Caitlin Katsiaficas, Justyna Segeš Frelak, and Camilla Castelanelli, 'Displacement, integration and return: What remote work possibilities for Ukrainians?', International Centre for Migration Policy Development, 21 February 2023.

54 In detail, 13% were from Kyiv city, whereas 13% were from Kharkiv Oblast, 9% from Dnipropetrovsk Oblast, 9% from Donetsk Oblast, 8% from Kherson Oblast, 7% from Odesa Oblast, 5% from Zaporizhzhia Oblast, 5% from Kyiv Oblast, 4% from Mykolaiv Oblast, 3% from Poltava Oblast, and 2% from Sumy Oblast. See UNHCR, 'Ukraine Refugee Situation: Population Movements' (February 2025).

proportion of displaced persons from Kyiv city and a decrease from the Kharkiv, Odesa, and Zakarpattia Oblasts.[55]

Internal displacement

There were 3,387,171 internally displaced persons in Ukraine in December 2025.[56] Of the IDPs, around 58% are from occupied or frontline territories, of which 28% are from Donetsk Oblast, 17% from Kharkiv Oblast, 12% from Kherson Oblast, 11% from Zaporizhzhia Oblast, and 7% from Luhansk Oblast.[57] During Russia's recent campaign against Ukraine's critical infrastructure in 2025-2026, a rise in displacement was noticed. One source – the Mayor of Kyiv, Vitali Klitschko – claims that 600,000 Ukrainians fled Kyiv in January 2026, which would be 25% of the entire city's population.[58] However, this is not yet confirmed by other sources. So far, Kyiv residents seem to have largely fled temporarily to other parts of Ukraine during the coldest weeks of winter and no increased net outflow from the country has been recorded.

If more parts of eastern – or even of southern and central – Ukraine come under Russian attack or control, the capacity of the remaining government-controlled territories of Ukraine – notably the smaller cities and poorer and less densely populated areas in the west – to accommodate additional IDPs will be limited. In fact, this capacity is already partly exhausted, so that, unlike in the period from 2022 to 2025, the majority of new permanently displaced persons – many of whom would be displaced for the second or even third time – would be likely to move abroad. Finally, under martial law, men between 23 and 60 years of age are restricted from leaving the country. However, in case Ukraine needs to accept an unfavourable ceasefire or if martial law is phased out or becomes ineffectively enforced, men aged 23-60 will also leave the country in large numbers. There are still around one million Ukrainians[59] (mostly men) who are actively serving in the armed forces, many of whom could swell the refugee movement.

55 Compared with UNHCR, *Displacement Patterns*, 53. See also UNHCR, *Lives on Hold: Intentions and Perspectives of Refugees, Refuge Returnees and Internally Displaced People from Ukraine* (November 2024).

56 IOM, 'Ukraine Displacement Tracking Matrix', accessed in December 2025.

57 IOM, *Ukraine Internal Displacement Report: General Population Survey* (October 2025), 4.

58 Asami Terajima, 'Over half a million left Kyiv in January amid Russia's energy blitz, mayor Klitschko says', *The Kyiv Independent*, 21 January 2026.

59 Boldizsar Gyori, 'Ukraine's military is 980,000 soldiers strong, Zelensky says', *The Kyiv Independent*, 6 January 2025.

Ukrainians fleeing Russian occupation, shelling, and drone attacks
Displacement in Ukraine is primarily driven by the Russian occupation of Ukrainian territories, as well as by constant Russian shelling of and drone attacks against frontline cities. Therefore, it is important to look at the patterns of displacement caused by the Russian occupation and shelling in order to assess the migration dynamics of the scenarios in this report.

In Russian-occupied Kherson, with a pre-war population of 290,000, only 70,000 – or 25% – remained during the occupation, mostly the elderly.[60] Due to constant shelling, this decreased even further to 66,000 people by early 2025.[61] Also in occupied Mariupol, Donetsk Oblast, only 120,000 – or 25% of the pre-war population of 480,000 – stayed behind.[62] In occupied Luhansk Oblast, there are claimed to be only 1.5 million people remaining, 40% of the pre-war population, whereas 60% have left.[63] And in occupied Melitopol, with a pre-war population of 155,000, there were only 60,000 to 70,000 – or 39-45% – left by 2023.[64] It is reported that Ukrainians are also being actively deported by Russia, under the disguise of so-called 'evacuations'.[65]

In the parts of Donetsk province occupied since 2014, the population has decreased by one third.[66] There are now only around or even less than 2 million people in the oblast. Those remaining are disproportionally the elderly, whereas the working-age population even has decreased by 65%.[67] However, because

60 Samya Kullab, 'One year after liberation, Ukrainians in Kherson hold on to hope amid constant shelling', AP, 11 November 2023.

61 'Regional Chief reveals current population of Kherson region', Ukrinform, 28 January 2025.

62 Luke Harding, 'It's like the USSR: residents on life in Mariupol a year since Russian occupation', *The Guardian*, 18 May 2023.

63 Inna Litvyn, 'Okkupanty vyzvali demograficheskii krizis v Luganskoi oblasti – CNS', Korrespondent.net, 24 October 2023.

64 Elena Rasenko, 'Mer Melitopolia soobshchil, skol'ko v gorode okkupantov', Korrespondent.net, 3 July 2023.

65 Litvyn, 'Okkupanty vyzvali demograficheskii krizis'.

66 The entire Donbas with the provinces of Donetsk and Luhansk had a pre-war population of an estimated 6.2 million in 2010. Due to the events of 2014, 1.5 million moved to other parts of Ukraine and 600,000 migrated or were deported to Russia (550,000) and Belarus (60,000). See Andrew Kramer, 'Nowhere to Run in Eastern Ukraine', *The New York Times*, 13 November 2014; UNHCR, 'Ukraine conflict uproots hundreds of thousands', 5 December 2014. Hence, around 33% left the region.

67 Yuriy Vyshnevskyy, 'Demography of ORDLO (separate districts of Donetsk and Luhansk regions)', DS news, n.d.

it is a largely Russian-speaking and partly Russia-leaning oblast, Donetsk is an exception rather than the rule. Kherson, on the other hand, with a smaller Russian-speaking population (see Map 1), is an average Ukrainian city that is more likely to represent the average effect of Russian control or even occupation on the remainder of Ukraine.

This suggests that from 2014 to 2023 between 33% and 75% of the pre-war Ukrainian population in Russian-occupied cities had left or fled. If we leave aside the somewhat unrepresentative case of Donetsk, the main pattern suggests that between 50% and 75% of the remaining population had fled from Russian occupation. This sets a precedent for developing future migration scenarios. People flee from frontline cities in similar proportions, notably due to constant shelling and devastated critical infrastructure. For example, in the case of the liberated city of Kherson, at least 75% fled.[68] And in Nikopol, Dnipropetrovsk Oblast, in government-controlled territory on the frontline still half the population had left.[69]

Drivers of (forced) migration

The key drivers of (forced) migration from Ukraine are, first, war and occupation; second, the economic situation; third, the liveability of the cities, towns and villages with regard to critical infrastructure; and fourth, the network effects.[70] In addition, secondary drivers that already existed before the war, such as discontent with economic, political, and social conditions also play a role.[71]

So far, as mentioned, 19.25% of Ukraine's territory is occupied by Russia. Around twenty or more towns and many smaller villages have been largely decimated by

68 'Regional Chief reveals current population of Kherson region', Ukrinform, 28 January 2025.

69 Hanna Sokolova-Stekh, 'Ukraine: Nikopol residents talk of life on the front line', DW, 10 December 2024.

70 See, for example, Tilman Brück, Kai M. Dunker, Neil T.N. Ferguson, Aline Meysonnat, and Eleonora Nillesen, 'Determinants and Dynamics of Forced Migration to Europe: Evidence from a 3-D Model of Flows and Stocks', IZA Discussion Papers, Institute of Labor Economics (September 2018); Irina Maidanik, 'The forced migration from Ukraine after the full scale Russian invasion: dynamics and decision making drivers', *European Societies* 26, no. 2 (2024): 469-480; Haodong Qi and Tuba Bircan, 'Modelling and predicting forced migration', *PLOS ONE*, 13 April 2023.

71 Iryna Lapshyna and Franck Düvell, 'We can only dream of Europe: The perception of social policy as a driver of migration. On the example of Ukraine', *The Journal of Social Policy Studies* 16, no. 4 (2018): 661-676.

the war.[72] More than 236,000 buildings have been destroyed or damaged during the war and over 2.5 million housing units – around 10% of the pre-war housing stock – have been damaged or are inaccessible due to the ongoing conflict.[73] Even though there was a pre-war oversupply of housing, the current situation is characterised by a shortage of rental accommodation – especially for the low-income segment of society.[74]

The war has also hit the Ukrainian economy hard, with the gross domestic product (GDP) dropping by at least 28.8% in 2022.[75] Recovery growth since then has been slow and has been decreasing from 5.5% in 2023 and 2.9% in 2024 to an expected 1.5% growth in 2027.[76] As a result, economic output is still 20% lower than it was in 2021. Exports, an important source of income, have halved and have not recovered.[77] Shadow economic activities comprise a significant proportion of the economy, presumably around 30%-50%.[78]

However, developments across the country are uneven. The economy in the western regions of the country has fared considerably better than that in the eastern regions. A general shift of businesses and economic activity is taking place from the declining industrial powerhouse of the Donbas, agriculture in the south, and the trade and transport sector to new high-tech sectors and defence industries in the safer west.[79]

The employment rate in Kyiv-controlled Ukraine is between 53% (accordingto the Ukrainian definition) and 67% (the international definition).[80] The unemployment

72 For example Mariupol, Lysychansk, Volnovakha, Sievierodonetsk, Bakhmut, Soledar, Popasna, Avdiivka, Rubizhne, Izyum, Lyman, Vovchansk, Kupiansk, Chasiv Yar, Toretsk, Marinka, Vuhledar, Siversk, and Huliaipole.

73 IOM, *Protracted Displacement and Precarious Housing: Access to Adequate and Affordable Accommodation in Ukraine* (October 2025), 3.

74 IOM, *Protracted Displacement and Precarious Housing*, 3, 15.

75 Maksym Samoiliuk, 'Ukraine War Economy Tracker', *Centre for Economic Strategy,* 10 March 2026.

76 OECD, *Economic Outlook Volume 2025 Issue 2: Resilient Growth but with Increasing Fragilities* (December 2025), 269-270.

77 Samoiliuk, 'Ukraine War Economy Tracker'.

78 Lysiuk, 'The Ukrainian shadow economy'.

79 See for example, Ralph Clem, Erik Herron, Timothy Hoheneder, and Khrystyna Pelchar, 'Ukraine's Economy Moves Westward: Implications for Rebound and Reconstruction', Ponars Eurasia, 9 April 2024.

80 IOM, *Employment, Mobility and Labour Market Dynamics in Ukraine* (November 2024), 2.

rate in 2025 was on average around 12%, following a downward trend.[81] Unemployment disproportionally affects low-skilled workers and IDPs, notably women and former workers from the mining sector and heavy industries, as well as agriculture.[82] The state spends more money than it receives in revenues,[83] and the vast shadow economy implies that the state budget is losing $4bn in tax revenue annually.[84] Foreign aid covered 56% of Ukraine's additional state budget needs in 2025, down from 73% in 2024,[85] and, even though the economy displays significant resilience,[86] its reliance on foreign aid betrays its fundamental instability.

Meanwhile, the Ukrainian labour market experiences simultaneous unemployment and shortages of highly-skilled labour.[87] Labour shortages, in turn, have resulted in considerable wage growth.[88] Nevertheless, the poverty rate stands at 36.9%, twice as high as before the war (although it is still lower than in 2015). Particularly affected are households in regions under attack and IDPs.[89] The need for remittances sent to Ukraine by migrants due to economic decline, damage to business and property, and high poverty levels remains high.[90]

The war has accelerated the economic transformation of Ukraine while widening inequality.[91] It prevents those without the necessary means from migrating,[92] while driving up the need for remittances – thus compelling migrants to remain abroad and to work rather than returning home. At the same time, economic

81 Samoiliuk, 'Ukraine War Economy Tracker'.

82 IOM, *Employment, Mobility and Labour Market Dynamics*, 6-7; 'Ukraine's Labour Market: Skills Shortage amid High Unemployment in 2025,' Agroreview, 11 November 2025; Inna Volosevch, 'The Economic Effects of Russia's War on Ukraine's Internally Displaced Women', Zentrum für Osteuropa und Internationale Studien, 26 July 2023.

83 OECD, *Economic Outlook Volume 2025 Issue 2*, 270.

84 Lysiuk, 'The Ukrainian shadow economy'.

85 Samoiliuk, 'Ukraine War Economy Tracker'.

86 World Bank, 'Ukraine: 'Firms through the War 2.0', 13 November 2024.

87 'Ukraine's Labour Market'.

88 OECD, *Economic Outlook Volume 2025 Issue 2*, 269.

89 World Bank, *Monitoring living conditions in Ukraine* (Fall 2025), 3.

90 Joe Baker, 'Ukraine's evolving remittances market', FXC Intelligence, 1 September 2025.

91 'Ukraine's Labour Market'.

92 Amanda Lenhardt, *The role of migration in ending extreme poverty*, DEEP (June 2023), 5.

growth, the demand for labour, high wage growth, and increasingly attractive income opportunities in the safer western parts of the country can drive return migration from Ukrainians abroad.[93]

The Ukrainian energy sector has been hit particularly hard by Russian air attacks. By January 2025, 80% of Ukraine's energy infrastructure had been damaged or destroyed and it seems that, due to repairs over the summer, by the end of 2025 20%-25% was still operational.[94] So far, pre-war overcapacities, a drop in demand, rationing, rapid repairs, energy and fuel imports, generator imports, and Western aid have prevented the collapse of Ukraine's energy system. However, the protection and reconstruction of the critical infrastructure is also imperfect as it suffers from a range of obstacles including ineffective spending and corruption.[95]

Survey data indicates that Russia's attacks on Ukraine's critical infrastructure significantly affects migration dynamics. A small-scale survey of Ukrainians in Ukraine from July 2024 suggested that for 49% of respondents the lack of water, heating, and light would be a driver of migration.[96] Moreover, a survey of Ukrainians in Switzerland in 2023 found that for 75% of respondents access to electricity and water services was important or very important in their return migration considerations.[97]

Nevertheless, the destruction of Ukraine's critical infrastructure and subsequent interruptions to energy supplies have not yet led to significant forced migration. This illustrates the resilience of Ukrainian energy suppliers and society. The Russian attacks and the destruction of critical infrastructure in 2024-2025 had almost no measurable (net) impact on migration.[98] Meanwhile, the Russian

93 On the drivers of refugee return, see Ala' Alrababa'h, Daniel Masterson, Marine Casalis, Dominik Hangartner, and Jeremy Weinstein, 'The Dynamics of Refugee Return: Syrian Refugees and Their Migration Intentions', *British Journal of Political Science* 53, no. 4 (2023): 1108-1131.

94 'Which neighbour exported the most electricity to Ukraine in 2024', CEENERGYNEWS, 12 January 2025.

95 Business Ombudsman Council, *Challenges in Protecting and Restoring Critical Infrastructure Through Private Sector Engagement* (February 2025).

96 Gradus Research Company, 'Migration Intentions of Ukrainians in Ukraine and Abroad', July 2024.

97 UNHCR, *Intentions and Perspectives of Refugees from Ukraine in Switzerland* (December 2023), 28.

98 Frank Düvell, 'Do Russia's attacks on power infrastructure drive forced migration from Ukraine?', Prague Process, 14 February 2025.

destruction of critical infrastructure during the winter of 2025-2026 does seem to have had an impact, possibly even a significant impact, but, so far, only on internal displacement.

Return migration

Return migration depends on the security, economic, and political situation on the ground in Ukraine, as well as the conditions in host countries. According to the International Organization for Migration (IOM), an estimated 4.53 million displaced Ukrainians have returned to date. Most of these returnees – namely 3.4 million thereof – were internally displaced persons, while only around 1.17 million people have so far returned from abroad.[99] However, an analysis of Eurostat statistics implies that since August 2022 a total of 2.5 million BTPs may have returned.[100] Hence, according to Eurostat's figures, every month 1.5% of displaced Ukrainians leave the EU – adding up to 18%, or 769,200 people, in any 12-month period or 36% in a 24-month period. This is somewhat in line with the return migration aspirations found in surveys, which range from 18% to 34% (see Table 1). Some national statistics calculate the numbers of returnees to be somewhere in between the IOM and Eurostat figures. Germany, for instance, has reported more than 450,000 returnees from Germany alone.[101] Extrapolated to the EU, this could mean up to 1.4 million returnees from the EU. These different figures in part also reflect the mobility of Ukrainians who may also return but come back and reapply. There are thus doubts with regard to how sustainable the returns are.

Migration aspirations

Aspirations and intentions explored in surveys are found to be statistically significant, meaning that there is a reliable correlation between intention and actual behaviour (migration). Therefore, intentions are a useful factor for

99 IOM, *Ukraine Returns Report: General Population Survey* (October 2025), 2.

100 From August 2022 to October 2025 the number of BTPs had risen by 626,000. In that same period, 3.1 million Ukrainians applied for TP status. The difference implies that the other 2.5 million had returned or moved to non-EU destinations. The monthly average of return/onward migration is thus 64,100. However, the possibility of re-application is not taken into account in this number.

101 Statistische Bundesamt, 'Im Fokus: Russland und Ukraine', 27 February 2026.

developing migration scenarios.[102] In the early 2000s, long before Russia's invasions, already up to 49% of Ukrainians held migration aspirations.[103] Just prior to the war, this had decreased to around 26%, possibly due to Ukraine's at least somewhat improved economic and political outlook.[104] By October 2025, and against the backdrop that several million Ukrainians had already fled the country, 41% of Ukrainians in the age group between 16 and 60 at least considered fleeing abroad and around 13% intended to migrate within six months, up from 11% in June.[105] However, since then, only around 340,000 Ukrainians aged between 18 and 65 have actually migrated and applied for temporary protection in the EU, suggesting that many of those who held migration aspirations have already put those aspirations into practice.[106]

Various surveys have been conducted on the migration aspirations of Ukrainian refugees abroad. For example, while an EU-wide UNHCR survey finds return aspirations among 62% of the respondents, an EU-wide survey by the European Union Agency for Asylum (EUAA) finds that only 34% have return aspirations (see Table 1). In the UK, only 32% of the Ukrainian refugees are reported to have no aspiration to stay.[107] However, these surveys were conducted at different points in time and in different countries asking differently formulated questions. As a result, the results are not comparable and are partly contradictory. Therefore, unfortunately, no clear trend can be discerned from these surveys.

102 Joop Adema, Cevat Giray Aksoy, Yvonne Giesing, and Panu Poutvaara, 'Refugee Return', RFBerlin Discussion Paper (March 2026); Hendrik P. van Dalen and Kène Henkens, 'Emigration intentions: Mere words or true plans? Explaining international migration intentions and behaviours', CentER Discussion Paper, Tilburg University (June 2008); Iren Gödri and Attila Feleky, 'Selection of migrants and realization of migration intentions – lessons from a panel study', Working Papers on Population, Family and Welfare, Hungarian Demographic Research Institute (2017); Özge Elif Özer, Adrien Remund, Clara Mulder, and Matthijs Kalmijn, 'Expectations' predictive power regarding international return and onward migration of immigrants', *Demographic Research* 52 (2023): 1111-1122; Philippe Wanner, 'Collection and Analysis of Quantitative Data in the Field of Migration. Past Trends, Current Status and Future Prospects', working paper, National Center of Competence in Research (October 2020).

103 Frank Düvell, Yuriy Bilan, Iryna Lapshyna, and Yulia Borshchevska, 'EUMAGINE project: the case of Ukraine', European policy brief, Centre on Migration, Policy and Society (January 2013).

104 Mikael Elinder, Oscar Erixson, and Olle Hammar, 'How large will the Ukrainian refugee flow be, and which EU countries will they seek refuge in?', Delmi Policy Brief, 30 May 2022.

105 Gradus, 'Migration intentions of Ukrainians'.

106 Eurostat, 'Decisions granting temporary protection'.

107 Camila Arroyo, 'What role could migration play in the reconstruction of Ukraine?,' *Economics Observatory*, 29 October 2025.

Table 1 Overview of survey results (2022-2025)

Survey agency	Time	Sample size	Coverage	Stay	Return	Undeci-ded	Further details
FRA	8-9/2022	14,685	Hungary, Poland, Romania, Slovakia, Bulgaria, Czechia, Germany, Italy, Spain, Estonia	38%	35%	23%	23% want to travel back and forth to Ukraine regularly
UNHCR	8-9/2022	4,800	43 countries	44% with no plans to return	13% within 3 months; 81% hope to return one day	43%	
UNHCR	12/2022-1/2023,	3200	EU		77-79%	18%	
EUAA/OECD	2/2022 – 1/2023	5317	EU	34%	N/A	N/A	
UIF	3/2023	1200	Globally	19%	68%	10%	Survey of relatives in Ukraine
CES	11/2022, 4/2023	1003, 404	EU	63% (11/2022)	32% (4/2023)	23% (11/2022)	Aspiration to stay increasing
UNHCR	4-5/2023	3850	Europe, incl. Russia, Turkey and Georgia	68%	76%	18%	Due to awkward questions stay and return intentions overlap
Rating Lab	6/2023	2116	EU	33%	49%	N/A	
ALI	7/2023	1032	EU	N/A	2/3	N/A	After the end of the war
IAB-BiB/FReDA-BAMF-SOEP	8-10/2022, N=11,225, 1-3/2023	6754	Germany	44%	33%	21%	30% aspire to have transnational ties
EWL	2/2023	400	Poland	45%	31%	16%	
UNHCR	2/2024	4962	EU	12%	62%	27%	The question was whether people were hoping to return one day
EUAA	2/23-11/24	7600	EU	33%	34%	33%	
EUAA	9/2025	9465	EU	44%	27%	31%	
BIB	8/2025	6000	Germany	59%	18%	24%	

An additional relevant aspect of the migration dynamics of Ukrainians is the aspiration of people still in Ukraine to reunite with their family members in the EU. A German survey from February 2023 implies that 33% of female refugees had partners abroad (mostly in Ukraine),[108] of which 46% aspired to get their partners to the EU. Meanwhile, only 6% of the male refugees had partners abroad (mostly in Ukraine), and 61% of these men sought family reunification. Hence around 17% of adult BTPs in Germany sought family reunification with their partners.[109]

The number of Ukrainians residing in the EU who still have children in Ukraine (9% of women) and who consider having these children join them is small (a maximum of 25,000). Unfortunately, there is no survey data on family reunification aspirations across the EU. Therefore, the German data is applied here to the EU situation and the EU-wide migration potential. However, one also needs to consider that in countries bordering Ukraine, such as Poland, where travelling back and forth is an alternative to relocation, the desire to reunite families might be less widespread. Hence, actual family reunification might be lower than this extrapolation implies.

Table 2 Key migration indicators

Population	2021 (pre-war)	41 million	
Population	2025	31 million	(in government-controlled territory)
Occupied territory	2025	19.25%	
Refugees	2025	5.9 million	
IDPs	2025	3.69 million	
Refugee returnees	2025	1.17 million	
IDP returnees	2025	3.4 million	
BTPs	2025	4,302,155	(incl. 1.5% third country nationals)
BTPs, monthly flow	1/23-10/25	79,500	Decreasing
BTPs, monthly net flow	1/23-10/25	12,000	Decreasing
Regular visits	2024	2%	
Residence permits	2024	1,629,348	Increasing
Migration aspirations	2025	41% consider / 13% intend	Decreasing
Return aspirations (EU)	2025	27%	Decreasing
Family reunification in EU		17% of women, 20% of men	only Germany

108 This has likely decreased since then because men have increasingly migrated to EU countries.
109 Herbert Brücker et al., *Geflüchtete aus der Ukraine in Deutschland: Ergebnisse der ersten Welle der IAB BiB/FReDA-BAMF-SOEP Befragung*, German Institute for Economic Research (February 2023), 86-87.

Scenarios for Ukraine and their resulting migration dynamics

Ukrainians in Ukraine, the EU, the UK, Norway, Switzerland, and Iceland, as well as in other host countries (such as Turkey, Canada, and the US), have various mobility options:

- more Ukrainians could flee from their homes but remain in Ukraine (so as to become internally displaced) or, vice versa, IDPs could return to their homes;
- more people could seek international protection or internationally displaced persons could return;
- BTPs could also relocate to third countries or return from these countries to the EU or Ukraine;
- BTPs could convert their protection status to residence permits instead;
- Ukrainians remaining in their host country could opt for family reunification and have their family members still in Ukraine to join them abroad;
- Ukrainians in the EU could engage in transnational activities, including pendular migration between their host country and Ukraine, working in two countries, and temporarily returning to Ukraine;
- Ukrainians in Ukraine could engage in (seasonal) labour migration abroad.

All options will be explored in the context of four scenarios for the future development of the war, as well as Ukraine's economy and politics.

Scenario 1: War of Attrition with Ukrainian Gains

Abstract: This scenario envisions a continuation of the war of attrition in which Ukrainian forces manage to make renewed advances on the battlefield. Kyiv also maintains control over its maritime waters and regains control over most of Ukrainian airspace. From a military perspective, this represents Ukraine's best-case scenario within the context of ongoing high-intensity conflict.

The scenario

In this scenario, the war of attrition continues for at least another 3 years, but the Ukrainian armed forces manage to make some advances on the battlefield at the expense of Russia.

Washington's efforts to broker a ceasefire keep faltering, as Moscow keeps raising its demands – such as a Ukrainian withdrawal from the entire Donbas and the far-reaching demilitarisation of post-war Ukraine – that are unacceptable to Kyiv, its European supporters, and more traditional transatlanticists in the US foreign policy establishment led by Secretary of State Marco Rubio. Despite efforts by the Kremlin to deflect the blame for the failure of the diplomatic process on Kyiv, European leaders and NATO Secretary General Mark Rutte skilfully manage to direct the blame for the failure of Donald Trump's diplomatic efforts towards the actual culprit – Vladimir Putin. Trump's mounting disillusionment and frustration with Putin leads Washington to issue extensive new financial and military support packages for Kyiv. Moreover, the US and the EU further tighten (secondary) sanctions on Russia, including by cracking down harder on Russia's shadow fleet.

In combination with a serious fall in global oil prices, these measures put Russian oil exports and – by extension – federal revenues under substantial pressure, while spilling over into a broader economic downturn and banking crisis, as many Russian companies and individuals are unable to repay their outstanding debts. As Russia's military expenditures drop, defence-industrial production also diminishes, which also leads to a decline in air strikes on Ukrainian infrastructure with drones and missiles. Moreover, the Russian state is no longer able to pay the substantial financial rewards that are necessary to persuade its citizens to voluntarily sign up to fight in Ukraine. Meanwhile, the volatile economic situation makes the Kremlin even less willing to announce another large-scale mobilisation than it already is.

Within this context, the Ukrainian armed forces succeed in making territorial gains in the east of the country. Ukrainian forces reconquer territory in Luhansk and Donetsk Oblasts (provinces), while also pushing back Russian armed forces in Zaporizhzhia Oblast. The Ukrainian armed forces regain control over certain areas in Donetsk province – small cities, mines, and natural resource deposits – while pushing back Russian forces in the Dnieper estuary, thus securing the city of Kherson against Russian drone and artillery strikes, and gaining control over an important transportation artery. Nonetheless, the Ukrainian offensive falls short of reconquering major – and largely destroyed – cities in the region like Luhansk, Donetsk, Mariupol', or Melitopol'. Because Ukraine secures most its airspace, some civilian international flights from western Ukraine resume.

Ukraine's battlefield successes, however limited, lead to a surge in optimism about the country's future potential within Ukrainian society and among Ukrainians living abroad. At the same time, however, political and institutional realities inside Ukraine are not proportionally transformed. There remains a confusing mix of declarations about upholding the rule of law and securing Ukraine's Euro-Atlantic future, alongside persistent corruption at all levels. As long as the Ukrainian military continues to achieve battlefield successes, however, public criticism of the government remains very limited.

However, as a consequence of the continuation of the war and the absence of significant improvements in the quality of governance, Ukraine's economic recovery remains very limited. In the absence of a substantial influx of foreign direct investment (FDI) and in the face of ongoing – though diminished – Russian bombardments of Ukraine's (energy) infrastructure, Ukraine's growth rate continues to flatten. Moreover, at least in the short term, the demographic situation keeps worsening as death rates remain high, while birth rates do not significantly rebound (and immigration remains limited – see below). Furthermore, Ukrainian border crossing is not liberalised, because the war continues.

Meanwhile, in Europe, the Temporary Protection Directive is extended in March 2027, as the war has still not come to an end and EU member states are concerned that they will face millions of asylum applications if they end temporary protection.

If a ceasefire is reached shortly after March 2030, this scenario will likely transition into a version of scenario 4, but with somewhat more Ukrainian territory under the control of Kyiv.

Implications for migration

The migration scenario in short:

- No new internal displacements or forced migration out of Ukraine, limited new emigration of men (family reunification, draft evasion);
- Return of 1.2-1.5 million BTPs from the EU;
- Some level of labour migration, mostly seasonal;
- Some level of immigration, possibly around 100,000 a year, with the trend increasing, depending on demand and legal opportunities.

In this scenario, there will be some improvement of the security situation in government-controlled Ukraine. This means, first and foremost, that there will be no significant new displacements of Ukrainians. In addition, increased optimism about Ukraine's future also diminishes incentives to emigrate. As a consequence, it can be assumed that almost no new forced migrations out of Ukraine will take place, apart from some reduced continuing illicit emigration of men who will continue to evade conscription into the army. However, the persistence of martial law will prevent large-scale mobility and migration, and thus also the reunification of Ukrainian men with their families abroad.

Instead, internally displaced Ukrainians will return to their villages in the liberated territories. Moreover, because the airspace is safer and bombing diminishes, IDPs will return to government-controlled cities, notably Kharkiv, Sumy, Chernihiv, Zaporizhzhia, Dnipro, Mykolaiv, Kherson, and Odesa. Whereas returns to de-occupied territories will be limited due to the large-scale destruction of housing, businesses, and farming stock, returns to other territories – if they are safe and not destroyed – will be significant. Of the 3.7 million IDPs from government-controlled territory who have an aspiration to return, 52% – or around 1.9 million – are likely to eventually return to their place of origin. Fewer IDPs will return from Kyiv, because more people prefer to settle down in Ukraine's capital city.[110] More internally displaced Ukrainians will return from other oblasts and cities. The return of IDPs will consequently free up accommodation and result in falling rental payments in central and western Ukraine. Available accommodation and lower rental payments will, in turn, also contribute to lowering barriers for return from abroad.

The combination of increased optimism about the future of Ukraine, increased security, slow economic growth, decreasing inflation, a stable currency, and increasing exports (due to safe transport routes) leads to the return of 1.2-1.5 million BTPs from the EU. Combined with the effective delivery of replacement parts (and thus sustainable repairs of the most critical infrastructure), this will also likely increase personal investments in repairs of private property and businesses. The high demand for skills and labour as well as increasing wages will improve the attractiveness of Ukraine.

However, due to the limited economic recovery and institutional reform, as well as a continuation of the war, any return from abroad will be limited to those who are most committed to return, and probably those who are currently unemployed.

110 IOM, *Ukraine Internal Displacement Report* (October 2025).

Moreover, because economic recovery remains limited and poverty rates are high, it can be assumed that the need for remittances sent by relatives in the EU remains high (and will only diminish once the Ukrainian state social security system reaches subsistence level). From Russia and non-European Western countries (like the US and Canada) few returnees can be expected, because refugees in Russia presumably hold pro-Russian views whereas Ukrainian refugees in the US and Canada are less inclined to return anyway.[111]

The combination of an improved security situation, continuing economic transformation, and the persistent demand for labour – notably skilled labour – will likely inspire some limited level of labour and other migration to Ukraine, which is expected to increase over time. From 2027 onwards, these flows could reach pre-war levels, but they would remain significantly lower than under ideal conditions. Furthermore, the return migration of current BTPs against the backdrop of a shrinking workforce in the EU will possibly result in an increase of vacancies in the host countries that could attract people currently still in Ukraine, notably the unemployed, to move to Europe. However, because most of the people still in Ukraine are less inclined to migrate, and in fact often lack the capability to do so, this might only generate some (seasonal) labour migration. Nonetheless, this is unlikely to result in permanent emigration.

In addition, air travel resumes, so that more people will be able to travel faster and more easily. This allows for more cross-border travel and transnational activities (such as regular visits to Ukraine, pendular movements to pursue work or business activities in Ukraine, or remote work in Ukraine) by Ukrainian refugees. The distinction between a temporary visit and return will likely become increasingly blurred as stays in Ukraine increase in frequency and length. At the same time, limited economic growth and continued fighting limit the attractiveness of return.

Meanwhile, a certain proportion of the Ukrainian Beneficiaries of Temporary Protection in the EU will apply for other types of residence permits based on their employment or education situation. According to the latest available

111 For, for instance, Aryan Karimi and Yuliya Byelikova, 'Wartime (im)mobilities: Effects of Aspirations-Capabilities on Displaced Ukrainians in Canada and Germany and Their Viewpoint on Those who Remain in Ukraine', *Journal of Ethnic and Migration Studies* 50, no. 10 (January 2024): 2403-2422.

data, this concerned 294,775 persons in 2024, mostly BTPs.[112] However, it can be expected that the numbers will rise as over time Ukrainians become clearer about their intentions, as the latest surveys imply (see Table 1), while the Council recommendations also already promote status conversion.[113] The residence or protection permit holders remaining in the EU will have almost no bearing on family reunification numbers, notably because husbands and adult sons will still not be permitted to leave Ukraine.[114] As the EU prolongs the TPD, Ukrainian refugees in Europe will not be under pressure to relocate to third countries.

Return scenario based on aspirations:

- Probably only half of Ukrainian refugees in the EU with return aspirations (13.5%)[115] plus half of those who are currently undecided (15.5%) might in fact return.[116] Hence, of the 4.3 million Ukrainian BTPs in the EU, 29% or 1.247 million might return. A similar percentage can be expected to return from the UK (29% of 176,000, hence 51,000) and Turkey (29% of 35,000, hence 10,150).[117]

Return scenarios based on applying precedence patterns:

- Based on the precedence case of annual returns observed so far under current conditions, a minimum of 776,000 would return. However, given the more favourable and safer conditions under this scenario possibly twice as many could return. Hence, 1.538 million could be expected to return.

The results of the two different methods for estimating return migration do not differ to any great extent. On the one hand, some of the returns will be diminished

112 Eurostat, ‘First permits by reason, length of validity and citizenship’, accessed December 2025.

113 Council of the European Union, ‘Protection of displaced Ukrainians: Council adopts recommendation about transition out of temporary protection’, 16 September 2025.

114 Older parents tend not to be inclined to migrate anyway and are thus not considered here.

115 This is because return aspirations are based on the condition of an end to the war. If this is only 50% achieved, then presumably only 50% will return.

116 There is currently no method to predict the behaviour of undecided individuals. For the sake of simplicity, it is assumed here that 50% will return. Given that this is the same estimated return rate as that of those who have expressed an intention to return, it should probably be treated as an upper bound.

117 This is because they display similar characteristics as Ukrainians in the EU and might thus behave similarly.

by transnational strategies.[118] Whereas, on the other hand, these also expand the number of people who at least return temporarily. Due to the improved security situation, the number of transnationally mobile Ukrainian refugees in the EU is estimated to double to 4%, hence to 172,000 individuals annually (but this is not cumulative). Finally, based on previous trends, around 100,000 new residence permits will be issued to an estimated Ukrainians annually.

Table 3 Scenario 1: migration within, to, and from Ukraine

Internally displaced persons (IDPs)	
Initial IDPs in government-controlled Ukraine	3,700,000
New IDPs	N/A
IDPs returning to their place of origin	1,900,000 -
Total remaining IDPs	**1,800,000**
Displaced Ukrainians in the EU	
Initial beneficiaries of temporary protection (BTPs)	4,300,000
BTPs returning to Ukraine	1,247,000 – 1,538,000
Relocation to non-EU countries	N/A
Conversion of TP to residence – employment	400,000
Conversion of TP to residence – student visa	100,000 -
Numbers of remaining BTPs in the EU	2,262,000 – 2,553,000
New international displacements to the EU	106,800[119] +
Total Ukrainians in need of protection in the EU	**2,368,800 – 2,659,800**
Other	
Transnationally mobile	172,000
Family reunification	N/A
Labour and student immigration into Ukraine	100,000

118 Staying or returning does not often simply display an either/or pattern. Instead, people often maintain activities in two countries.

119 89% of 120,000 people displaced abroad are expected to come to the EU countries. These will be mostly men: in August 2025, when men seeking temporary protection reached a low point, some 25,000 applied; this can be assumed to halve and to further decrease.

Summary (see Table 3): There will be no new internal displacements and a limited number of new persons seeking international protection (mainly men). Instead, IDPs and BTPs will return in significant numbers. Also, transnational activities including pendular movements between the host country and Ukraine will increase subsequently leading to some more part-time and possibly also permanent returns. Even so, the number of Ukrainians who migrated to the EU due to the war will remain substantial (2.9-3.2 million), with 2.4 to 2.7 million of them needing protection. Meanwhile, the number of BTPs will further decrease due to status conversion. Still, family reunification will be negligible. Some (seasonal) labour migration will be picking up once again.

Scenario 2: War of Attrition with Russian Gains

Abstract: This scenario also envisions a continuation of the high-intensity war of attrition, but unlike Scenario 1, Russia gains the upper hand as its strategy to erode Ukraine's will and capacity to resist begins to yield tangible results. While the overall character of the conflict remains destructive and grinding, Russian forces succeed in making significant territorial advances – capturing substantial parts of eastern Ukraine – and continue to intrude into the entire Ukrainian airspace.

The scenario

Rebounding oil prices provide the Russian federal government with sufficient financial means to continue the war despite Western sanctions and the stagnation of many sectors of the Russian economy. This, in turn, enables the Kremlin to recruit sufficient numbers of soldiers to keep the pressure on Ukraine without having to resort to another unpopular, large-scale mobilisation, despite continued high battlefield losses. In addition, Russia's military industry is able to produce sufficient numbers of drones and missiles to continue and further expand its large-scale air attacks on Ukrainian infrastructure, even though military production in other areas – such as tanks and artillery – continues to remain well below battlefield losses.

Meanwhile, Ukraine continues to suffer from insufficient recruitment figures, while Western aid further dwindles. The Trump administration retreats from the diplomatic process after it concludes that it cannot achieve a diplomatic solution to the conflict in the short term. As a result, no more military or financial aid is forthcoming from Washington, although the US continues to share intelligence with the Ukrainian armed forces and still allows the Ukrainians and their European supporters to purchase American military equipment. Moreover, a combination of the rise of far-right governments in various European countries – including France, Germany, and the UK – and general war fatigue also leads to dwindling EU financial and military support for Kyiv.

This provides the context for Russian military advances along multiple fronts in Ukraine. At the cost of large numbers of casualties, Russian forces manage to take the Ukrainian fortress cities of Kramatorsk, Slovyansk, and Kostyantynivka in a grinding campaign, as well as Sumy in the northeast. As a result, Russia is in control of the entire Donbas region by the end of 2028. In the east and south, Russia moves within shelling and drone-attack distance of the large Ukrainian cities of Kharkiv, Dnipro, and Zaporizhzhia, as well as Chernihiv, causing a significant number of the inhabitants of these major population centres to flee. Moreover, Russia continues its large-scale air campaign against Ukraine's infrastructure, and primarily against its critical energy infrastructure, which results in structural blackouts severely affecting many businesses and public administrations while also causing severe heating problems during the winters.

Meanwhile, Ukrainian politics and society undergo a further militarisation. As Ukraine desperately lacks manpower in the trenches, it is forced to lower the military recruitment age to 20 and prohibits men from the age of 18 from leaving the country. Substantial protests erupt over this, which can only be partially repressed by the National Guard of Ukraine. Space for Ukrainian democracy and freedom of speech is shrinking, while discontent further undermines the capacity of Ukraine to defend itself. A period of political instability follows, as tense political battles spill over into legal conflicts over corruption and property between key elites.

In light of the substantial diminution of Western aid and the ongoing attacks on Ukrainian energy infrastructure, the Ukrainian economy starts to shrink even further, dropping below its 2022 level by 2028. As state resources dwindle, the social security system erodes, more and more people have to rely on their own resources as well as friends and relatives, with the shadow economy and crime increasing proportionally. Illicit economic activity flourishes as black markets grow, while rapidly expanding Ukrainian organised crime networks seep into Europe. Increased criminality in Ukraine will also increase criminal activity among Ukrainian refugees. This further undermines the image of Ukraine in Europe, putting further pressure on remaining European support.

As more right-wing governments come to power in Europe, the TPD is not prolonged after 2027 and is replaced with a patchwork of national policies. As a result, increasing numbers of Ukrainians stay in the EU illegally. The end of the TPD also prompts an increased inflow of migrants into Europe just before its expiry, as people seize what may be their last opportunity to relocate. The policy on refugees hardens within many EU member states, as does the political rhetoric concerning migrants. Meanwhile, Russian advances, as well as the substantial deterioration of Ukraine's future prospects and current living conditions, lead to an intensified and increasingly irregular outflow of Ukrainian refugees, including to Europe.

If Russian advances lead to a ceasefire sometime shortly after March 2030, this scenario will likely transition into a version of scenario 3, albeit with more Ukrainian territory coming under Russian control.

Implications for migration

The migration scenario in short:

- Significant new displacements and forced migration;
- Increasing emigration of (young) men and families with (teenage) male children;
- Significant family reunification in host countries;
- The decline of transnational activities;
- No return of IDPs;
- No return of Ukrainians from abroad;
- Substantial secondary migration to alternative destinations.

In this scenario, there are significant new displacements of Ukrainian citizens, while current IDPs will not be able to return to their homes and many more realise that there will be no return opportunities in the foreseeable future. In Donetsk and the northeastern border regions, advancing Russian forces will forcefully displace no more than 300,000-400,000 people, possibly less. This is because most of those in these newly occupied territories who wanted to and could flee have already done so or were evacuated, so that only a few hundred thousand people remain in these territories.

Furthermore, intensified aerial and artillery attacks will affect the populations of Kharkiv (1.2 million), Dnipropetrovsk (1.18 million), government-controlled Zaporizhzhia (350,000), Sumy (460,000), and Chernihiv (550,000) Oblasts, and especially in their provincial capital cities. Following the precedent cases of Mariupol (occupied) and Kherson (occupied, liberated, and bombarded), where 75% of the population fled, as well as Nikopol (regular bombardment), where 50% fled, it is likely that from the above-mentioned regions similar proportions – 50-75% – will flee, depending on the severity of the attacks. In addition, the habitability as well as the economic base of Kyiv city (with a population of 2.4 million) and of Odesa (with a population of 2.1 million) will be substantially diminished, so that many people will leave.

Because the safer parts of the country are already saturated with IDPs, many newly displaced Ukrainians will seek to find refuge abroad. The precedent case of Syria, for example, suggests that this could be 45% of all displaced persons. Ukrainian surveys also point towards a similar level, as 41% consider migration.[120] Of those 41%, it may well be only half (or 20.5% of the total) who will actually migrate if the security situation is not too severe.[121] The migration of men is assumed to continue along the highest levels observed in recent months (48,000 in September 2025).[122] Not only do new Ukrainian territories fall under Russian occupation, but discontent with the political and economic development of Ukraine will intensify peoples' migration aspirations, as experience shows, and an increasing percentage of those having migration aspirations will probably move abroad.

Travel between the EU and Ukraine will become increasingly complicated and unsafe, which diminishes exploratory visits and transnational activities. Simultaneously, the EU will become less attractive to Ukrainian refugees, so that increasing numbers thereof – notably the highly skilled – will explore alternative destinations in non-EU countries (in 2022-2024, these were already 11% of Ukrainian refugees). Diminishing legal opportunities in the EU combined with a lack of return options will also likely mean that increasing numbers of Ukrainian refugees instead apply for asylum (with the aim of at least winning time through subsequent appeal procedures and otherwise obstructing a forced return).

120 Gradus, 'Migration intentions of Ukrainians'.

121 The 20.5% rate is so far a mere guess; a better formula has not yet been developed.

122 Eurostat, 'Decisions granting temporary protection'.

The number of Ukrainian asylum applications will increase further. In addition, there will be an increasing number of former BTPs applying for residence status in the EU according to their situation. So far, on average 328,000 residence permits have been issued to Ukrainians since 2022. In the future, and following the recent recommendation by the Council of the EU,[123] this number will significantly increase, possibly quintupling.[124] Most Ukrainian refugees in employment, around 60% of the working-age group (and this trend is increasing), will thus try to convert their TP status into employment-based residence permits.

Meanwhile, some humanitarian solidarity movements including diaspora organisations in the EU, supported by employers and parts of the media, will hamper and obstruct enforcement efforts to send refugees who do not qualify for a resident permit back to Ukraine. As a consequence, only a small number of Ukrainians will be returned. Because return becomes increasingly unlikely, more Ukrainian residents in the EU will seek family reunification and bring their relatives still in Ukraine to safety. On the other hand, due to the hardened stance of the EU, Ukrainians – notably the highly-skilled – will explore alternative destinations in North America as well as in South America, Australia, New Zealand, South America, the Gulf countries, and other destinations.

123 Delegation of the European Union to Ukraine, 'Protection of displaced Ukrainians: Council adopts recommendation about transition out of temporary protection', European External Action Service, 17 September 2025.

124 The assumption is that of the 4.3 million BTPs, 59% are adults of whom 60% are employed. The latter are likely to apply for employment-based residence permits – hence 1.5 million.

Table 4 Scenario 2: migration within, to, and from Ukraine

Internally displaced persons (IDPs)	
Initial IDPs in government-controlled Ukraine	3,700,000
New IDPs	4,441,500 – 6,642,000[125]
IDPs returning to their place of origin	N/A +
Total remaining IDPs	**8,141,500 – 10,342,000**
Displaced Ukrainians in the EU	
Initial beneficiaries of temporary protection (BTPs)	4,300,000
BTPs returning to Ukraine	N/A
Relocation to non-EU countries	473,230
Conversion of TP to residence – employment	1,548,000[126]
Conversion of TP to residence – student visa	100,000 -
Numbers of remaining BTPs in the EU	**2,178,770**
New international displacements to the EU[127]	7,123,560 – 11,719,520[128] +
Total Ukrainians in need of protection in the EU	**9,302,330 – 13,898,290**
Other	
Transnationally mobile	N/A
Family reunification	536,800

Summary (see Table 4): No returns of IDPs or Ukrainian refugees will be feasible. Instead, inside Ukraine an additional 4.4-6.6 million people will be displaced. However, because only 41% thereof move abroad, another 2.6-3.89 million will

125 238,500 from occupied Donetsk, 508,000–862,500 from Chernihiv, 465,000–697,500 from Sumy, 1,200,000–1,800,000 from Kharkiv, 1,680,000–2,520,000 from Dnipropetrovsk, and 350,000–525,000 from Zaporizhzhia.

126 60% of the current adult population is employed, and this trend is increasing. If they otherwise lose their protection status, almost all will likely apply for residence status.

127 Subgroups include 576,000 men of conscription age (based on monthly applications in September 2025 times 12 (months), when applications were the highest since the winter of 2022 (see Eurostat, 'Decisions granting temporary protection') and 50,000 asylum applicants (double the amount in 2024), although that is merely a guess.

128 89% of the total new 8,004,000–13,168,000 international displacements are expected to move to the EU. The total consists of 1,999,000–2,988,000 from the six oblasts in footnote 125, 984,000 from Kyiv, 861,000 from Odessa, and 4,160,000–8,335,000 from the rest of the country.

remain as IDPs within the country.[129] Of the 4.3 million Ukrainian BTPs currently in the EU, up to 2.2 million will continue to require protection status based on their vulnerability, but probably somewhat less. A small majority will either acquire another status or move to other safe countries. Due to the high number of IDPs in western parts of Ukraine, it will not be feasible for former BTPs to return to Ukraine. Meanwhile, another 8.0-13.2 million Ukrainians will possibly seek protection abroad, of whom 7.1-11.7 million (89%) will likely seek protection in the EU, including 220,830-363,305 persons (3.1%) in the Netherlands,[130] while 11% will move to other safe countries.[131]

Scenario 3: A Ceasefire without Substantial Economic Recovery

Abstract: In this scenario, the war subsides through a volatile and porous ceasefire, with fighting and Russian intrusions into Ukrainian airspace dropping to low levels and the frontline being effectively frozen – comparable to the situation between 2015 and 2021. Nevertheless, as a result of the unstable security situation, stalling institutional reforms, and Russian attacks on Ukrainian merchant ships in the Black Sea, Ukraine experiences only a limited economic recovery or even enters a recession in the years that follow. As a result, the environment remains challenging for returnees.

The scenario

Under pressure from the Trump administration, which threatens to cut the supply of intelligence to Kyiv as well as the imposition of tariffs and sanctions against Ukraine, Kyiv accepts a ceasefire in 2027, even though the ceasefire does not include meaningful security guarantees and explicitly states that Ukraine cannot become a member of NATO. No convincing mechanisms to monitor this ceasefire are put in place. Moscow, meanwhile, agrees to the ceasefire because it promises substantial sanctions relief, while Russia is not really making significant gains on the battlefield and is facing increasing difficulties in recruiting sufficient

129 At some point in 2022, 41% of all displaced persons approximately moved abroad, while 59% stayed in Ukraine. Because the ratio keeps shifting, this percentage is only an approximation.

130 This is based on applying the current pattern whereby 3.1% of the protection seekers in the EU have chosen the Netherlands, although the final outcome depends on national policy conditions, dispersal policies and saturation levels.

131 As above, this is based on current patterns but ultimately depends on national policies and saturation levels in the EU.

soldiers short of a large-scale mobilisation. Meanwhile, Washington also begins to pressure its European allies to begin lifting their sanctions on Russia.

As part of the ceasefire deal, Ukraine needs to hold elections within one hundred days. President Volodymyr Zelensky, however, loses the election. The new incumbent president uses the wartime centralisation of power as a starting point to try to consolidate an authoritarian regime in Kyiv. During the war, power became increasingly concentrated in Kyiv vis-à-vis the regions and within the presidency vis-à-vis the other institutions of the central governmental apparatus. Meanwhile, the loss of the political power of oligarchic business groups means that they can no longer effectively counterbalance Kyiv. 'De-oligarchisation', while often hailed as democratic progress, is a double-edged sword at best. As a result, progress on institutional reform stalls and the prospects for EU accession are low. Due to a lack of reforms, Ukraine makes no progress towards meeting the institutional conditions for EU membership, while EU member states like Hungary, Poland, and Slovakia – as well as key constituencies in other member states – remain opposed to Ukrainian EU accession irrespective of any reforms.

Russia, meanwhile, contributes to the destabilisation of Ukraine by intensifying its hybrid war against Ukraine – flooding the country with disinformation and conducting widespread sabotage and cyberattacks against critical infrastructure. Moreover, Russian forces continue to periodically attack Ukrainian positions along the frozen front line and target Ukrainian civilians in the de facto border region with artillery, drones, and even missiles. And although Ukrainian airspace is reopened for civilian flights, Russia periodically attacks Ukrainian merchant ships in the Black Sea with drones and submarines. In the absence of convincing security guarantees by the West, the threat of a renewed Russian invasion continues to hang over a weakened Ukraine.

As a result of ongoing insecurity and increasing authoritarianism, the Ukrainian economy enters into stagnation. A large part of the state budget – more than two-thirds – is earmarked for defence, including the sizeable army (circa 400,000 military personnel) that Ukraine sees itself forced to maintain in order to protect itself against – and, hopefully, deter – future Russian aggression. As a result, inflation and unemployment remain quite high, while wages and the expectations of foreign investors remain low. In this environment, foreign investment remains limited and reliance on financial assistance from international allies will remain high. Investment in the reconstruction of civilian infrastructure remains far behind Kyiv's optimistic projections.

Due to the uncertain security environment, martial law is only gradually and partially lifted. As a result, travel restrictions on Ukrainian men leaving the country remain in place and some form of conscription will be maintained. Meanwhile, the 2027 ceasefire prompts a European debate on the future of the TPD. However, since the ceasefire was achieved after March 2027, the TPD had already been renewed for another year. Due to the precarious situation in Ukraine and limited return prospects, the TPD is also extended twice after that, thereby generating institutional inertia that delays any major policy changes until March 2030. However, several EU member states reduce social benefits for Ukrainian refugees.

With the TPD having been extended until 2030, the economic prospects in Ukraine being poor, the security situation remaining volatile, and martial law still being partially in place in Ukraine, opportunities and incentives for Ukrainian refugees to return will be limited. Moreover, many Ukrainians – especially younger generations, and in particular young men of working age – will face incentives to leave their country, especially if they can join relatives and family members already abroad. At the same time, the partial continuation of martial law continues to restrict men in their travelling.

Implications for migration

The migration scenario in short:

- Limited further displacements;
- Seeking international protection will continue, although at lower levels than at present;
- Labour migration to Europe will increase significantly;
- Asylum seeking will increase;
- Transnational activities will increase;
- Family reunification will be significant;
- The return of IDPs will be limited and will take place only to safe regions;
- The return of BTPs will be very limited, as BTPs will instead abandon return aspirations and increasingly convert their status to residence permits;
- Onward migration to third countries will be limited.

Because of the improved though volatile security situation, little new displacement – otherwise caused by occupation and shelling – will occur. The destruction of the critical infrastructure will cause only limited and probably temporary internal displacement from urban to rural areas, because that destruction will be quite limited and because the conditions in rural areas – the lack of public services, schooling, medical services, electricity, and the internet – do not provide long-term perspectives. Meanwhile, there will be little or no urban-to-urban internal displacement, simply because the situation will be quite similar across cities in the entire country.

However, some level of seeking international protection will still occur, mainly driven by the further depreciation of critical infrastructure. Furthermore, due to the unsatisfactory political and economic developments in Ukraine, migration aspirations will considerably rise again to levels similar to the mid-2010s. Therefore, an increasing proportion of the remaining population will want to migrate for economic purposes.[132] While labour migrants will seek destinations worldwide, most will prefer European countries due to their proximity, cultural familiarity, and established networks. The ageing populations and shrinking labour force in the EU will provide drivers also from the demand side. Nevertheless, emigration will remain well below the current EU levels of 50,000 newly granted TP statuses monthly. Men will flee in lower numbers than between 2023 to 2025 because they are no longer threatened with being sent into active battlefield situations. Meanwhile, Ukrainians seeking asylum in the EU, 70,867 Ukrainians during the years 2022-2025, may increase due to the authoritarian turn in Ukraine.

Meanwhile, opportunities for displaced Ukrainians to return will remain limited. Substantial parts of Ukraine remain occupied while a strip along the frontline remains unsafe due to occasional artillery shelling and drone attacks. Therefore, there will be no return of IDPs (around 58% of the total) or refugees (around 24% of the total) to these territories. However, as a consequence of the ceasefire, an end to Russian territorial advances, and the improved security situation in many eastern settlements, IDPs will begin to return to government-controlled territories in the east of the country. But because certain cities near the frontline continue to experience shelling and drone attacks, a certain proportion will be prevented from returning. This trend is further driven by the existing level of destruction combined with a lack of economic recovery: the economy to the east of the Dnieper River remains at only half its pre-war level. Given that only about half

132 Limiting social benefits, however, will not have a significant impact on Ukrainians' migration, because many working-age Ukrainians abroad will be employed, while those who are unfit for or are unable to work – usually because of some family constraints or other vulnerabilities – will likely not face benefit cuts.

(49%) of the displaced people from safe regions east of the Dnieper (42% of IDPs) have return aspirations, only 21% of the total number of IDPs is likely to return.[133]

Furthermore, the migration of IDPs and the return of BTPs are interrelated. Because the security situation improves, IDPs in central, southern, and western Ukraine partially return. As a result, some housing will be freed up so that, in turn, there is some scope for BTPs to return to Ukraine. While those originating from central, southern, and western oblasts will find some economic opportunities, Ukrainian refugees from eastern oblasts will find much fewer opportunities, and will thus refrain from returning. Hence, only 11.2% of refugees from non-eastern/southern regions will likely return.[134] Moreover, due to the improved security situation, transnational mobility will increase, possibly doubling from 2% to 4% of Ukrainians in the EU. But because overall instability and uncertainty persist, this will likely not result in significant levels of permanent return.

Furthermore, the security and in particular the economic situation are not conducive to labour migration to Ukraine. The reopening of Ukrainian airspace while security remains volatile and economic prospects are limited will facilitate travel, visits, and transnational activities, though not a return. In fact, on the contrary, Ukrainians abroad will find it easier to see family and friends in Ukraine without having to return permanently. A positive side effect, however, will be that some of the income from the increasingly stable sources of income in the host countries will be invested in Ukraine and this will enhance some local development. That, in turn, will locally decrease the need for labour emigration and overall contribute to stabilising some local economic and migration situations.

133 See IOM, *Ukraine Internal Displacement Report* (October 2025).

134 Of the total number of refugees, 14% from non-eastern/southern regions are strongly committed to return (EUAA, 'Situation in Ukraine and Displacement to the EU+', 7), but only 80% are estimated to have employment prospects, so that only 11.2% will likely return. The 80% is due to GDP remaining 20% below pre-war levels, which indicates that there are also roughly 20% fewer jobs and business opportunities. Of the BTPs, 23% (989,500) are from eastern (partly occupied) territory and will not return. Of the remaining 3.3 million BTPs, 14% (463,470) are committed to returning. Of these, around 370,776 might eventually return.

Among BTPs, the extension of the TPD means that Ukrainians will face little pressure to return while the conditions for returning to Ukraine are deterring. Therefore, a steady proportion of BTPs will further delay their return or even abandon their return aspirations and instead continue to apply for other types of residence permits in their host countries. A decreasing proportion will retain its return aspirations and thus prefer to maintain its protection status.

The fact that many Ukrainians who sought protection abroad will not return, combined with the partial lifting of martial law and the reduction of the size of the Ukrainian armed forces, means that Ukrainian men will emigrate in increasing numbers – both regularly and irregularly. First, those who are desperate to reunite with their families abroad will leave. Second, those who are frustrated with the direction of the political and/or economic developments in Ukraine will leave. Notably, the remainers in the EU who have converted their TP status to residence permits will invite relatives in Ukraine for family reunification. The figure for the migration of men as well as for migration for the purpose of family reunification overlaps with the figures of migration for economic reasons because migrants often have multiple motivations.[135] The combination of factors and trends will result in increasing family reunification, 17%-20% of the BTPs and other residence permit holders have such aspirations.

Because the legal status of Ukrainians in the EU remains stable while (economic) integration continues and intensifies, there is no fundamental need to seek protection or income in other countries. Therefore, only a small proportion of new protection seekers will leave the EU for third countries, at levels similar to the pre-war situation.[136]

135 The size of the overlap is not possible to establish; the proportion is estimated here to be one third of the first two groups.

136 An estimated 20% of pre-war migrants went to non-EU countries, apart from Russia and Belarus. See Migration Data Portal, ‘Ukraine migration overview’.

Table 5 Scenario 3: migration within, to, and from Ukraine

Internally displaced persons (IDPs)	
Initial IDPs in government-controlled Ukraine	3,700,000
New IDPs	N/A
IDPs returning to their place of origin	759,400 -
Total remaining IDPs	**2,940,600**
Displaced Ukrainians in the EU	
Initial beneficiaries of temporary protection (BTPs)	4,300,000
BTPs returning to Ukraine	370,776
Conversion of TP to residence – employment	1,458,936[137]
Conversion of TP to residence – student visa	100,000 -
Numbers of remaining BTPs in the EU	**2,370,288**
New international displacements to the EU	60,000[138] +
Total no. of Ukrainians in the EU in need of alternative status after TPD ends	**2,430,288**
Other	
Transnationally mobile	172,000
Family reunification	490,590[139]
Economic migration to the EU	Several hundred thousand

Summary (see Table 5): Around 3.93 million Ukrainians originally displaced by the war will likely remain in the EU, with about half converting to residence permits, while an additional small number (around 60,000) will leave Ukraine to seek protection in the EU. Meanwhile, those who remain in Europe will potentially be joined by around 500,000 family members. As a consequence, the number of (former) Ukrainian refugees in the EU will likely shrink only minimally as compared to the current level of 4.3 million. Instead, several hundred thousand Ukrainians

137 This is based on the following formula: of the 3.5 million remaining BTPs, 69% are adult; of these, 60% are employed, with the trend increasing.

138 80% of the 75,000 new TP and asylum seekers.

139 Of the Ukrainians, 44% are adult women and 25% are adult men; 17% of the women and 20% of the men have family reunification aspirations. The calculation assumes that family reunification encompasses only one person (a husband or a wife); if more people are involved, the numbers will increase substantially.

will probably seek labour migration to the EU, regularly or irregularly, notably those men no longer subject to the migration restrictions of martial law, adding to the total number of Ukrainians in the EU.

Scenario 4: A Ceasefire with Substantial Economic Recovery

Abstract: This scenario assumes a more robust ceasefire that is more favourable to Ukraine, resulting in a sustained reduction of hostilities and a stable, frozen frontline. Unlike Scenario 3, Ukraine experiences substantial economic recovery in the post-war period. In this scenario, robust security, political stability, and deep institutional reform resulting in improved governance create the foundations for a return to substantial economic growth. This scenario explores the implications of a more optimistic post-conflict trajectory for refugee return and broader migration dynamics.

The scenario

Scenario 4, like scenario 3, entails a ceasefire reached in 2027. But, unlike the previous scenario, this ceasefire is robust and leads to a sustained reduction of hostilities.

Under the influence of US Secretary of State Rubio, European leaders, and NATO Secretary General Rutte – as well as some helpful assists from clumsy Russian diplomacy – Trump decides to put pressure on Russia. The US president provides new military and financial aid packages to Kyiv, including more and effective air defence systems, while imposing tighter sanctions on Russian oil and browbeating India into substantially decreasing its imports of Russian oil. Meanwhile, a downward turn in global oil prices puts further pressure on Moscow. The Kremlin is facing a weakened economy and finds it increasingly difficult to allocate sufficient funds to the military and defence industry while keeping the population reasonably content with sufficient social spending and limited inflation.

Under these conditions, the US and Europe manage to broker a fairly robust ceasefire in which both Ukraine and Russia make significant concessions. Kyiv will not join NATO, while Washington will ease its sanctions regime against Russia and pledges that NATO will not seek further enlargement into Eastern Europe. At the same time, Ukraine will not have to give up more territory – the conflict being frozen along the existing frontline – and Moscow explicitly states that it has no objections to Ukraine joining the EU.

Moreover, Kyiv receives meaningful security guarantees from the US and Europe, which entail that 'should Moscow attack Ukraine again, the country's allies would reimpose sanctions on Russia, provide new financial support to Kyiv, and offer Ukraine military assistance that goes beyond what they would offer in peacetime. The United States and its allies (...) codify these pledges into law and create mechanisms that activate them if Russia attacks'.[140] Furthermore, a part of Russian frozen assets will also be allocated for the reconstruction of Ukrainian infrastructure (with a part of the profits going to the US), while another part is handed back to Moscow in yearly instalments – provided that Russia does not violate the ceasefire.

The path towards EU membership is open for Ukraine, especially after far-right movements that are sceptical of Ukraine suffer electoral defeats in various EU member states. This, in turn, strengthens Ukraine's incentives for institutional reform, as EU membership with hard conditionality has been the key lever through which democratic and rule-of-law reforms have been achieved in in post-communist Eastern Europe. Presidential elections are held in mid-2028 and are won by Zelensky, who puts his war dividend behind the reform agenda to seal his legacy as not just a war hero, but also as a great reformer who will secure Ukraine's European future. The Ukrainian president is supported in this by a newly elected pro-reform, pro-Western coalition government centred on his Servant of the People party. Corruption is pushed back and the creation of the rule of law proceeds apace. In parallel, martial law is gradually lifted in the 12 months following the signing of the ceasefire agreement.

Robust security, a newly elected coalition government providing political stability, and significantly improved governance create the foundations for a return to substantial economic growth, driven by large inflows of FDI, as economic prospects, physical security, and the security of property rights improve. Ukrainian airspace is once more opened for civilian flights and the Black Sea for merchant vessels going to and from Ukrainian harbours. There is strong and dynamic economic growth, led by a revived agricultural sector, emerging IT and renewable energy sectors, and a formidable and strategically important defence industry, which continues to develop in part due to increasing orders from Europe – as European nations continue to rearm to counter the Russian threat in the longer term, even after the ceasefire.

140 Samuel Charap and Jeremy Shapiro, 'A Snapback Solution for Ukraine', *Foreign Affairs*, 7 October 2025.

The robust ceasefire results in EU member states ending the TPD and gradually phasing out provisions for Ukrainian refugees with the aim of either facilitating transition into other residence statuses or their return to Ukraine. Meanwhile, the improved security and economic recovery within Ukraine act as a pull factor for refugees to return. This leads to substantial numbers of Ukrainian refugees returning home, although also significant numbers of Ukrainian men try to join their families abroad whenever the restrictions on them crossing the border into Europe are lifted.

Implications for migration

The migration scenario in short:
- No new displacements;
- No new protection seekers in the EU or elsewhere;
- Significant return of IDPs and BTPs;
- Increase of transnational mobility;
- Significant decrease of BTP or other humanitarian statuses in the EU;
- Significant conversion of remaining Ukrainians to residence status;
- Considerable family reunification.

Due to the effective ending of hostilities, no new internal displacements will occur. Equally, no new international protection seeking – TP or asylum – will be observed. Most other IDPs having return aspirations will probably return, although IDPs from occupied territories most likely will not. In addition, some of those IDPs who do not currently have return aspirations will nevertheless likely be attracted by new employment and business opportunities and return in the reconstruction boom.

Current BTPs from occupied territory, around 560,000, will also likely not return. The same will be the case for most established BTPs, meaning those in a satisfactory employment situation abroad. They will rather convert to residence permits based on employment, education, or family status. Certain groups of non-established, vulnerable Ukrainians – such as single mothers and widows – may also not return. The remaining Ukrainians abroad will trigger family reunification, mostly men (husbands and adult sons) joining them abroad. Also, some outward labour migration will resume, but, because of the positive economic developments and rising wages, this will be rather temporary, remain well below pre-war levels, and decrease over time. Onward migration to third countries will play no significant role because Ukrainians will either be able to stay in the EU on a residence permit or return to Ukraine attracted by favourable conditions.

Furthermore, Ukrainians who still retain return aspirations will likely return in significant proportions, as will probably many of those who are currently undecided. Against the backdrop of the favourable security, political, and economic outlook, even some established BTPs – like residence permit holders without return aspirations – will likely reassess their options and some may eventually even return. Due to the favourable conditions in Ukraine, transnational activities by Ukrainian refugees abroad will increase significantly, possibly tripling. This will subsequently result in more returns, notably also the return of those who currently have the intention of remaining.

Finally, there may be a significant labour migration to Ukraine from both Europe (experts, business leaders, etc.) and from the Caucasus and Central Asia (due to historical and linguistic links), as well as from Turkey and generally the Middle East and India (inspired by pre-war small-scale migration patterns). However, the extent of this migration will also depend on Ukraine's migration policies.

Table 6 Scenario 4: migration within, to, and from Ukraine

Internally displaced persons (IDPs)	
Initial IDPs in government-controlled Ukraine	3,700,000
New IDPs	N/A
IDPs returning to their place of origin	1,549,500[141] -
Total remaining IDPs	**2,150,500**
Displaced Ukrainians in the EU	
Initial beneficiaries of temporary protection (BTPs)	4,300,000
BTPs returning to Ukraine	2,494,000[142]
Relocation to non-EU countries	N/A
Conversion of TP to residence – employment	700,000[143]

141 42% of the total; this refers to the percentage of IDPs from government-controlled territory.

142 58% of the total; this refers to the percentage of BTPs with return aspirations and those who are currently undecided.

143 Of the remaining Ukrainians, 69% are adults, of these 60% are employed (and the trend is increasing).

Conversion of TP to residence – student visa	50,000[144] -
Numbers of remaining BTPs in the EU	**1,056,000**
New international displacements to the EU	N/A
New asylum seekers in the EU	N/A
Total no. of Ukrainians in the EU in need of alternative status after TPD ends	**1,056,000**
Other	
Transnationally mobile	258,000
Family reunification	306,000[145]

Summary (see Table 6): No new displacements occur, while up to half of the IDPs – 1.5 million in total – will possibly return. In addition, around 2.5 million of the current BTPs will likely return. The remaining 1.8 million will either convert to residence permits or remain on humanitarian grounds. Those remaining will then trigger family reunification of an additional 306,000 Ukrainians. Consequently, around 2 million (former) Ukrainian refugees – 46% of the current number – might continue to be hosted in the EU. In addition, some post-war new labour migrants can be expected. In contrast, large-scale labour migration to Ukraine will gradually commence and increase, assuming that a policy is in place to prepare the necessary conditions, that society as a whole accepts this, and that there is sufficient supply.

144 Compared to scenario 3, twice as many Ukrainians return. This will comprise people from all walks of life. Therefore, it can be assumed that the number of students will also decline in a similar manner.

145 Of the Ukrainians, 44% are adult women and 25% are adult men; 17% of the women and 20% of the men have family reunification aspirations. This calculation assumes that family reunification encompasses only one person (a husband or a wife). If more people are involved, the numbers will increase substantially.

Conclusion

This report has presented four scenarios for the future of Ukraine with a particular focus on migration dynamics. Two of the scenarios envisioned a continuation of the Russo-Ukraine war, with either Ukraine (scenario 1) or Russia (scenario 2) advancing territorially. The other two scenarios posited a future in which the war comes to an end through a ceasefire, with either limited (scenario 3) or substantial (scenario 4) economic recovery for Ukraine. The migration dynamics in the scenarios range from enormous future flows of around 7.1 to 11.7 million newly displaced Ukrainians arriving in the EU in scenario 2, to up to 2.5 million Ukrainians returning to Ukraine from the EU (scenario 4).

Table 7 Comparing key migration dynamics across the four scenarios.

Scenario	BTPs returning to Ukraine	Total no. of (former) Ukrainian refugees in the EU (excl. family reunification)[146]	Total no. of Ukrainians in the EU in need of protection/in need of an alternative status after TPD ends (excl. family reunification)[147]	Total no. of Ukrainians in the Netherlands (3.1%) in need of protection/in need of an alternative status after TPD ends (excl. family reunification)
Scenario 1	1,247,000 – 1,538,000	2,868,800 – 3,159,800	2,368,800 – 2,659,800	73,408 – 82,454
Scenario 2	(virtually) none	10,950,330 – 15,546,290	9,302,330 – 13,898,290	288,372 – 430,847
Scenario 3	370,776	3,989,224	2,430,288	75,339
Scenario 4	2,494,000	1,806,000	1,056,000	32,736

The first major conclusion of this report is that **in all scenarios a large number of Ukrainians – including those in need of protection or in need of an alternative status after TPD ends – will likely remain in the EU in the long term**. Even in the most positive scenario, in which the war ends with a robust ceasefire and Ukraine achieves a substantial economic recovery (scenario 4), no more than

146 This includes those that have converted their protection status to a work or study permit. At least a part of the Ukrainians who will come to Europe through family reunification will receive the TP status. However, because there is no clear method to calculate the proportion of these people who will need the TP status, they have been excluded from this calculation.

147 This excludes those that have converted their protection status to a work or study permit.

2.5 million BTPs are expected to return, while more than a million Ukrainians whose TPD status has expired are expected to remain in the EU. In total, about 1.8 million (former) Ukrainian refugees would remain in the EU – not counting the 306,000 Ukrainians who would come to Europe due to family reunification. At the same time, however, in most scenarios the number of Ukrainians in need of protection in the EU will diminish compared to current numbers (see Table 7). The only exception is scenario 2, in which the war of attrition continues, and Russia makes significant territorial gains.

A second important conclusion is that **a scenario in which more Ukrainian refugees flee to Europe is realistic, and the EU needs to prepare for such an eventuality**. Scenario 2 presents one option of what that could look like, but the scenario could be made somewhat less or more severe depending on how successful Russian territorial advances and air attacks are. Even in scenario 3, in which the number of Ukrainians in need of protection in the EU diminishes to about 2.4 million, more Ukrainians end up coming to the EU (490,590 due to family reunification, 60,000 more newly internationally displaced Ukrainians) than return to Ukraine (370,776), while more than 1.5 million BTPs transfer to residence status.

A third key conclusion of this report is that **an end to the active fighting through a ceasefire is an insufficient condition for Ukrainian refugees to return in large numbers**. Once the war ends, the prospects for refugee return will also be determined by the nature of the ceasefire and the robustness of Ukraine's resulting security, the level of economic recovery that will take place, and the political developments in post-war Ukraine. For Ukraine to achieve a substantial economic recovery, it must implement extensive institutional reforms to strengthen the rule of law, combat corruption, and thereby significantly improve property rights and the investment climate. Scenario 3, however, illustrates that Ukraine could also experience a political development in the opposite direction, becoming more authoritarian in the process.

A ceasefire without a significant economic recovery (scenario 3) would still lead to more than 2.4 million Ukrainians in need of protection remaining in the EU, while many (around 1.6 million) would convert their status into residence permits. As such, the total number of (former) Ukrainian refugees staying in the EU would be almost 4 million (see Table 7). Around the same number would transfer to residence permits in the case of a war of attrition with Russia winning ground (scenario 2), although in that case 9.3 to 13.9 million people would be expected to be in need of protection in the EU (see Table 7), partly due to the fact that there would be a shrinking capacity to accommodate additional IDPs within Ukraine.

Other drivers impacting migration dynamics include the political and economic situation in the EU (including labour market dynamics), the capabilities of potential migrants to put their migration intentions into practice, public support and the personal perceptions of both the host countries and Ukraine, as well as the concrete immigration and integration policies of host countries.

More than just the numbers involved, however, the policies of host states also impact the possible legal pathways that are available to those destined to stay. The end of the TPD (without similar alternatives), for example, would lead many Ukrainian refugees to apply for alternative statuses in their respective host countries. If they are unable to do so, the refugees in question would more likely move out of the EU and towards other host countries (mostly the highly skilled) or resort to illegality rather than return en masse to Ukraine. In order to avoid such a turn towards illegality, the EU member states should develop specific plans to allow Ukrainians who are unable to return to remain in their host countries for a longer period of time, while also presenting longer-term strategies for integrating those who are unlikely to return at all.