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Recent trends in the geographical mobility of workers in the EU

This supplement to the Quarterly Review provides in-depth analysis of recent selected labour market and social developments. It is prepared by the Employment Analysis and Social Analysis Units in DG EMPL. This supplement was prepared under the supervision of G. Fischer (Director), R. Strauss (Head of Unit) and R. Maly (Head of Unit). The main contributors were: L. Aujean, L. Rathe and F. Tanay. Editorial support was provided by A. Ujj.

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Supplement to the EU Employment and Social Situation Quarterly Review

Recent trends in the geographical mobility of workers in the EU

This supplement presents recent data on the intra-EU mobility of workers in the European Union. It updates the previous supplements on mobility published in the June 2012 and June 2013 EU Employment and Social Situation Quarterly Review (ESSQR).[1] The first section provides general information about the numbers of mobile EU citizens and their labour market situation. The second focuses on recent trends in mobility flows, on the basis of migration statistics, the EU Labour Force Survey (LFS) and national data. The third and last section aims to measure whether the migration of EU citizens to non-EU countries has increased since the onset of the economic crisis. Data used in the current document are available at:
http://ec.europa.eu/employment_social/employment_analysis/quarterly/essqr-2014june-sup1mobility.xls

Country abbreviations used in this supplement.

EU-15 refers to the 15 Member States that formed the EU before May 2004: Austria (AT), Belgium (BE), Denmark (DK), Finland (FI), France (FR), Germany (DE), Greece (EL), Ireland (IE), Italy (IT), Luxembourg (LU), the Netherlands (NL), Portugal (PT), Spain (ES), Sweden (SE) and the United Kingdom (UK). Among them, southern EU-15 refers to Greece, Italy, Portugal and Spain and other EU-15 refers to the eleven others.

EU-13 refers to the 13 Member States that have joined the EU since 2004 and EU-12 refers to the 12 Member States that have joined the EU in 2004 and 2007 (i.e. EU-13 without Croatia). Of this group, EU-10 refers to the Member States that joined the EU in 2004 (Cyprus (CY), the Czech Republic (CZ), Estonia (EE), Hungary (HU), Latvia (LV), Lithuania (LT), Malta (MT), Poland (PL), Slovakia (SK) and Slovenia (SI)) and EU-2 refers to those that joined in 2007 (Bulgaria (BG) and Romania (RO)). EU-8 refers to the eight central and eastern European countries that joined the EU in May 2004, to some of which transitional arrangements applied until 2011 (i.e. EU-10 countries except Malta and Cyprus).

EU-28 refers to all EU Member States, while EU-27 refers to the 27 EU Member States before Croatia (HR) joined in July 2013.

[1] See EU ESSQR June 2012, pp.31-40 and EU ESSQR June 2012, pp.38-50.

1. Mobile EU citizens and their labour market situation

Table 1 summarises the situation in 2013 regarding the 'stock' of mobile EU citizens living in the EU (as well as third-country nationals for comparison purposes) and their labour market outcomes. Slightly over 10 million EU citizens of working age were living in an EU country other than their own in 2013 (including around 310 000 from Croatia, the Member State that joined most recently), compared to 15.5 million third-country nationals.

Table 1: Number of working-age (15-64) people by group of citizenship and labour market outcomes (EU-28, 2013)

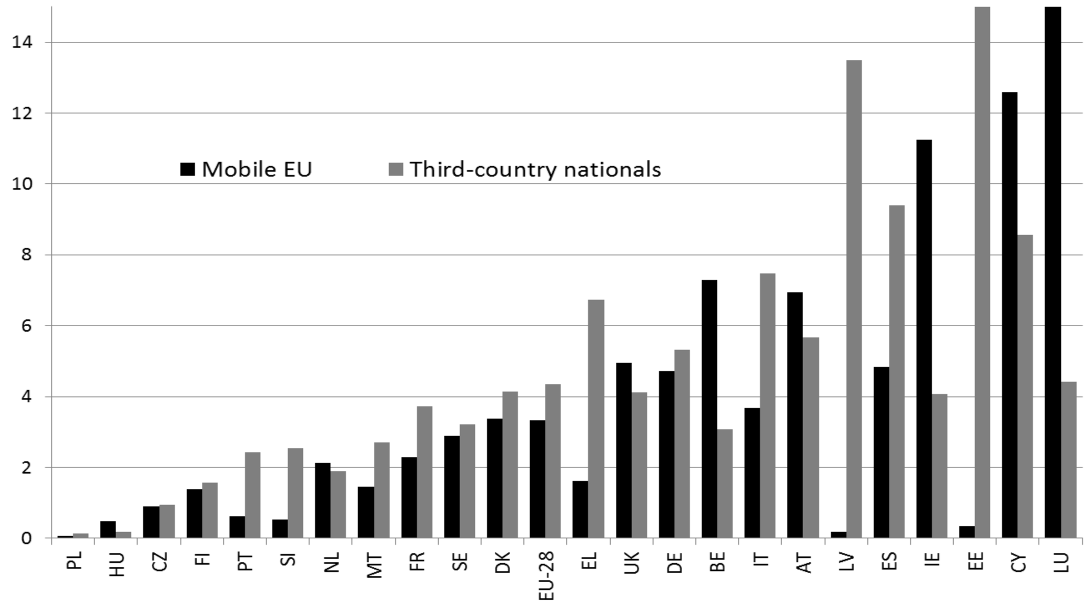
Group of citizenship	Number (in millions)	Activity rate	Employment rate	Unemployment rate
Mobile EU citizens	10,3	77,7	68,0	12,4
of whom:				
South (EU-15)	2,4	77,7	69,8	10,1
Other EU-15	2,7	75,1	68,8	8,2
EU-10	2,3	80,7	72,9	9,6
EU-2	2,5	78,5	60,9	22,4
Croatians	0,3	73,1	68,4	6,3
Third-country nationals	**15,5**	**67,7**	**52,6**	**22,2**
Nationals	**305,5**	**72,0**	**64,5**	**10,2**
All groups (incl. nationals)	**331,2**	**71,9**	**64,1**	**10,8**

Source: Eurostat, EU-LFS. Note: While the activity and employment rates are calculated for the whole working-age population (15-64), only the unemployment rate is calculated for the economically active population (aged 15+).

In 2013, mobile EU citizens were more likely to be economically active (average activity rate of 77.7 %) than nationals[2] (72 %) and third-country nationals (67.7 %). This was also the case for all sub-groups of mobile EU citizens presented in table 1. Their employment rate was also higher (68 %) than that of nationals (64.5 %) and third-country nationals (52.6 %). However, their outcomes in terms of employment/unemployment differ across origin countries. On one hand, the employment rate of mobile citizens from EU-10 countries (72.9 %) and EU-15 countries (69-70 %) was relatively high compared to that of nationals (64.5 %). On the other hand, mobile citizens from EU-2 countries have a lower employment rate (60.9 %) and a higher unemployment rate (22.4 %). This is mainly as a result of the worsening labour market situation in Spain,[3] a major recipient country of EU-2 citizens. The employment rate of Croatian nationals living in other EU countries is high (68.4 %) and their unemployment rate relatively low (6.4 %).

[2] By 'nationals', we refer in this Supplement to EU nationals living in the country of their citizenship.
[3] According to LFS data, as much as 30 % of working-age (15-64) EU-2 nationals living in another Member State in 2013 were living in Spain. If Spain is excluded from the calculations, the employment rate of intra-EU movers from EU-2 countries reaches 64.6 % and their unemployment rate goes down to 15.2 %.

Chart 1: Mobile EU citizens and third-country nationals as a percentage of the total labour force, by country of residence, 2013



Source: DG EMPL calculations based on Eurostat EU-LFS. Notes: LU: the percentage for mobile EU citizens is 46.7%; EE: the percentage for third-country nationals is 15.3%. No data is available for BG, HR, LT, RO and SK because the figures are too small to be reliable. The reliability of the data for EE, LV, MT and PL is limited due to the small size of the sample.
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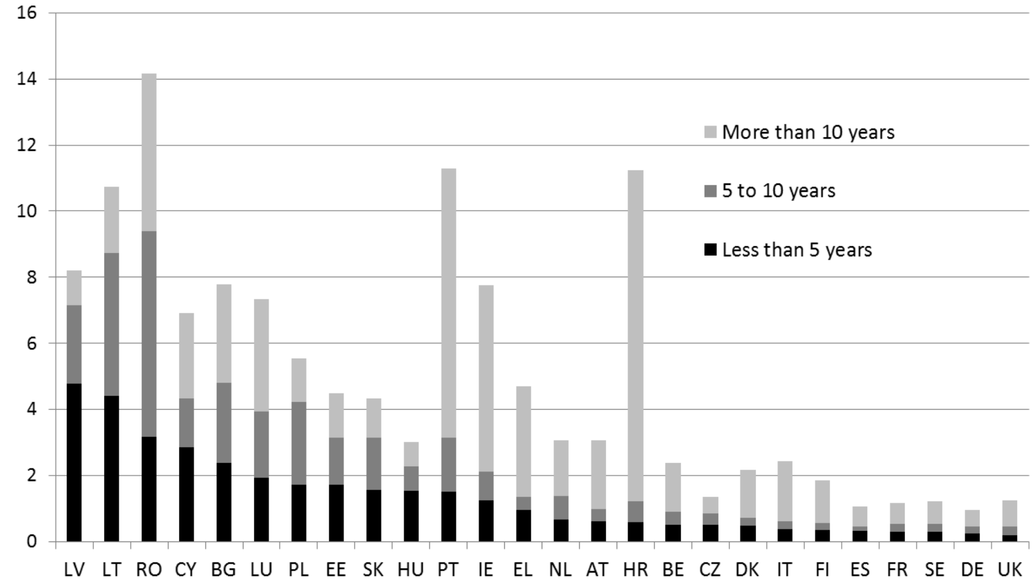
Chart 2: Mobility rate by country— working-age citizens living in another EU country, by years of residence (age group 15-64, 2013, as a percentage of the working-age population of the country of citizenship)



Source: DG EMPL calculations based on Eurostat EU-LFS. Notes: Figures for MT and SI are too small to be reliable. Figures for CY, DK, EE, FI, LU and SE are not reliable due to the small size of the sample.
Click here to download chart.

To complement this overall picture, chart 1 shows the proportion of mobile EU citizens and third-country nationals as a percentage of the labour force of Member States. Apart from the special case of Luxembourg, the proportion of mobile EU citizens in the labour force is higher than 5 % only in Cyprus, Ireland, Belgium and Austria. It is between the EU average (3.3 %) and 5 % in the UK, Spain, Germany, Italy and Denmark. This ratio is quite low (or even not available due to very low values) for most EU-13 countries.

The proportion of third-country nationals in the labour force (for which the EU average is 4.4 %) is greater than the proportion of mobile EU citizens in 15 out of the 23 Member States for which reliable data is available. This is particularly true of the Baltic countries, Slovenia, Greece and Portugal — but also in Italy and Spain (where there are twice as many third-country nationals as mobile EU citizens).

Chart 2 depicts the situation in terms of countries of origin, by showing the number of working-age nationals living in another EU country as a percentage of the working-age population in the country of origin (with the distribution in terms of years spent abroad). With more than 10 %, Romania, Portugal, Croatia and Lithuania have the highest proportion of citizens of working-age living in another EU country, followed by Latvia, Bulgaria, Ireland and Luxembourg with 7-9 %. However, time spent abroad does differ widely, from recent migration in the case of most EU-12 countries to old migration in the case of Portugal, Croatia and Ireland. At the other end of the spectrum, mainly large Member States such as the UK, Sweden, France, Spain and Germany have the lowest proportion of citizens living in another EU country (around 1 %).

Box 1: The main results from the Mobility in Europe 2013 Report: a detailed analysis of the labour market outcomes and characteristics of intra-EU movers from central and eastern Member States

The Mobility in Europe 2013 Report[4] commissioned by DG EMPL and recently published under the aegis of the European Job Mobility Laboratory[5] analyses various aspects of geographical and job mobility in the EU. It presents recent trends in EU-wide mobility and the labour market outcomes and characteristics of intra-EU movers, focusing on those who moved from EU-12 countries to live in EU-15 countries, in comparison with natives of those countries[6] and migrants from non-EU countries. The main findings can be summarised as follows.

Migrants[7] tend to be younger and women. Migrants are, on average, younger than people born in the country in which they live, particularly those who moved within the EU. For example, 59 % of men of working age (15-64) born in the EU-10 and living in the EU-15 were under 35 in 2012, compared to 38 % of native born. In the case of migrants from outside the EU, there is little difference in the proportion of them aged under 35, but there are fewer migrants in the older age bracket (55-64), so the group is still younger overall. Unlike usual trends observed, migrants are more likely to be women than men, especially those who moved from EU-12 countries. On average, in 2012 women made up around half of those aged 15-64 who were born in the EU-15, but accounted for 56-57 % of those born in the EU-12 but now living in the EU-15 and for 52 % of those born outside the EU.

The employment situation of migrants varies depending on their country of origin. People who moved from the EU-10 to live in the EU-15 countries are more likely to be in work than native born, while the reverse is true for those born in EU-2 or outside the EU. These differences apply to both men and women but are more pronounced in the case of men. The lower employment rates of EU-2 and non-EU migrants are at least in part a result of the crisis, which has had a differential impact on the various groups. Although employment rates declined generally between 2008 and 2012, EU-2 and non-EU migrants were affected far more than other groups. The consequence of this is that EU-2 and non-EU migrants are more likely to be unemployed than native born are.

Migrants are more likely to have temporary or part-time jobs. Migrants are more likely to be employed on a temporary contract than those born in the country in which they live, even excluding those under 25, many of whom have temporary jobs. The situation is similar for part-time work. The relative incidence of part-time work has increased significantly in most countries over the crisis period, even more so among migrants than among the domestic population.

Migrants are often over-qualified for the jobs they do. Migrants are more likely to have jobs which are not in line with their levels of educational attainment. In most EU-15 countries, a great many migrants with tertiary-level education have jobs which do not require their level of qualification. Many of them, especially women, have elementary manual jobs which demand little in the way of qualifications, if any. EU-2 migrants are particularly over-qualified. While men do manual jobs, women are rather in manual or sales and service jobs, with many of them working in domestic service, including in care for elderly persons.

***Migrants are at greater risk of redundancy but it takes them less time than nationals to find another job*.** Among those who are out of work but have worked before, more migrant men than men born in the country in question had been made redundant or dismissed, rather than leaving a job of their own will or because their fixed-term contract came to an end. The picture was less uniform for women. Once unemployed, mobile workers from the EU-10 and the EU-2 take shorter to get employed again than those born in the EU-15 country in question. The

[4] Available at http://www.mobilitypartnership.eu/WebApp/Reports.aspx.
[5] http://www.mobilitypartnership.eu.
[6] In the Mobility in Europe 2013 Report, mobile EU citizens and non-EU migrants were defined according to their country of birth rather than of citizenship, which is the parameter used in this supplement.
[7] The term 'migrants' is used in the Mobility in Europe 2013 Report in a broad sense, to refer to those born abroad in EU or non-EU countries. Nevertheless, the various groups are analysed separately (EU-10, EU-2, non-EU) in order to identify what they have in common and the differences between them.

proportion of unemployed men and women who have been out of work for a year or more (long-term unemployed) was therefore lower for these groups in 2012 than for native born and non-EU migrants.

Migrants are less likely to access help from the public employment services. Given they are less likely to be fully aware of the services on offer or how to access them, fewer migrants than native born register with the public employment services in order to get assistance when unemployed. While at least three quarters of male and female unemployed natives are registered with the public employment services, the proportion of mobile EU-10 and EU-2 workers who are registered is closer to two thirds. That said, the figures vary depending on sex and country of origin. Those who do register are also less likely than their native born counterparts to receive unemployment benefits.

Migrants who move within the EU need more support*.* Overall, the evidence suggests that in many countries migrants tend to be at a disadvantage in the labour market compared to the native born population, that they have been worse affected by the deteriorating labour market conditions over the crisis period. That is why they might benefit from additional support measures.

Box 2: According to EU-Survey on Income and Living Conditions (SILC), no over-use of social security benefits by mobile EU citizens

Analysis recently published by the Social Situation Monitor[8] looks at how the receipt of welfare benefits differs between nationals and mobile EU citizens in EU countries, on the basis of EU-SILC 2011 data.

The analysis focuses on differences in the receipt of non-contributory benefits (such as family benefits, housing benefits, poverty relief) and differences in the receipt of unemployment benefit. A rough comparison shows that the use of social security differs between nationals and migrants in several cases.

To sort out pure composition effects, multivariate statistical analysis (probit regressions) of benefit receipt (education, unemployment, disability, housing, family-related transfers and transfers to combat social exclusion) was carried out for 18 countries, with specifications controlling for age, gender, education, household type and labour market status.

The analysis shows that, for most benefits (unemployment, education, social exclusion), the differences between nationals and mobile EU citizens are small and statistically insignificant in most of the countries analysed. Only in the case of housing benefit in a few countries did the analysis find that the balance tipped in favour of mobile EU citizens. However, data indicates that in most of the EU, mobile EU citizens are less likely to receive family- and child-related benefits.

[8] Social situation monitor, *Access of mobile EU citizens to social protection*, Research note No 10/2013, available at http://ec.europa.eu/social/BlobServlet?docId=11568&langId=en.

2. Recent trends in intra-EU mobility

This section focuses on recent trends in intra-EU mobility flows, using various sources of data. It starts by presenting figures on mobility intentions according to Eurobarometer surveys, then describes the trends in in-flows and out-flows according to Eurostat 2012 migration statistics, followed by an analysis based on EU-LFS 2013 data. It finishes with national statistics for the two main destination countries of mobile EU workers, Germany and the UK.

2.1 Mobility intentions among Europeans

Willingness to be mobile according to 2011 and 2013 Eurobarometer surveys

Before analysing trends in mobility, one must take into account recent changes in mobility intentions across EU countries, on the basis of the Single Market Eurobarometer surveys conducted in 2011 and 2013 (see table 2). While both surveys asked people whether they would consider working in another EU country, the 2013 survey limited the time period to the 'next 10 years'. Results should therefore be interpreted with caution, bearing in mind that the percentages for the 2013 answers are likely to be comparatively lower than those for the 2011 answers due to the question's limiting the time period.

Table 2: Willingness to be mobile, across EU countries in 2011 and 2013

Country	Would consider working in another EU country *(open-ended)* **in 2011**	Would consider working in another EU country *(in the next 10 years)* **in 2013**	Change (in percentage points)
Austria	15 %	12 %	-3
Belgium	23 %	18 %	-5
Bulgaria	17 %	20 %	**3**
Croatia	N/A	43 %	N/A
Cyprus	20 %	35 %	**15**
Czech Republic	13 %	14 %	**1**
Denmark	40 %	24 %	-16
Estonia	42 %	36 %	-6
Finland	46 %	28 %	-18
France	20 %	21 %	**1**
Germany	27 %	16 %	-11
Greece	27 %	29 %	**2**
Hungary	27 %	32 %	**5**
Ireland	38 %	32 %	-6
Italy	20 %	25 %	**5**
Latvia	43 %	33 %	-10
Lithuania	31 %	28 %	-3
Luxembourg	22 %	16 %	-6
Malta	23 %	18 %	-5
Netherlands	29 %	19 %	-10
Poland	26 %	23 %	-3
Portugal	20 %	22 %	2
Romania	24 %	21 %	-3
Slovakia	29 %	29 %	**0**
Slovenia	32 %	39 %	**7**
Spain	32 %	35 %	**3**
Sweden	71 %	54 %	-17
United Kingdom	36 %	31 %	-5
EU-27	**28 %**	**25 %**	**-3**

Source: Special Eurobarometer 363 (2011) and 398 (2013).
The following questions were asked: Special Eurobarometer 363 (2011): 'Would you consider working in an EU Member State other than your own?' and 398 (2013): 'Would you consider working (again) in an EU Member State other than your own in the next 10 years?'. Grey cells show the highest proportions/positive changes.

The overall proportion of EU-27 residents considering working in another EU country decreased slightly from 28 % in 2011 to 25 % in 2013. In 2013, Sweden had the highest proportion (54 %) of those who would consider working in another Member State, followed by Croatia (42 %), Slovenia (39 %) and Estonia (36%) and then by Cyprus, Spain and Latvia. Austria (12 %), the

Czech Republic (14 %) and Germany and Luxembourg (both 16 %) had the lowest proportions. In 2013, the bottom five countries had some of the lowest unemployment and youth unemployment rates, indicating that people are less likely to want to work abroad if they have good job opportunities in their home country.

The scope of the question asked in the 2013 survey was narrower than that of the question asked in the 2011 survey. This gives rise to a bias towards the lower end of the answer spectrum when comparing the results of the two years, with a decrease for 16 out of the 27 Member States. There is nonetheless a clear and substantial increase in a limited number of countries whose economic situation has been difficult over the last few years: Cyprus (+15 percentage points - pp), Slovenia (+7 pp), Hungary (+5 pp) and Italy (+ 5 pp) and, albeit to a lesser extent, Bulgaria (+3 pp), Spain (+3 pp), Greece (+2 pp) and Portugal (+2 pp).

In terms of drivers of mobility, those willing to work in another Member State in 2013 were by far most motivated by their 'desire to get a better salary' (50 % of respondents). Sharing second place (28 % of respondents) 'better professional development or career opportunities' and the 'inability to find a job in their own country'.

The reasons for considering working in another Member State vary considerably from country to country. Citizens from newer Member States (EU-12) give the possibility of 'getting a better salary', 'better working conditions' and 'better social guarantees' as their motives considerably more often than EU-15 citizens, who tended to give as their motives 'better professional development or career opportunities', 'the desire to live or work in a different country' and 'family or personal reasons'. Citizens from southern EU-15 countries give the 'inability to find a job in their own country' (42 %) as their motive for moving much more often than those from central and eastern Member States (23%). They are less likely to attribute their moving to their 'desire to get a better salary' (54 % versus 80 % for those from central and eastern Member States).[9]

Increase in the number of jobseekers who have an EURES online CV

The recent changes in the number of jobseekers registered on the EURES portal confirm an increase for many countries in the number of people taking practical steps to be mobile (see table 3). In January 2014, around 55 % of all EU jobseekers registered on EURES (637 000 out of a total of 1.16 million) come from the four southern EU countries: Spain, Italy, Portugal and Greece. As in the previous year, jobseekers from Italy accounted for the biggest absolute and relative increases in the number of jobseekers who registered between June 2013 and January 2014.[10] Romania saw an increase in EURES jobseekers of 11 % in those six months. This could be due to the end of the transitional arrangements from 1 January 2014 on. Since 2010, however, Greece has seen the greatest increase (394 %), followed by Spain (295 %) and Italy (196 %).

[9] Non-weighted averages of individual country values.
[10] January 2014 is used as the latest reference point due to the change in data collection as a result of the revamp of the EURES website.

Table 3: Number of jobseekers registered in EURES CV Online, by country of residence, in thousands

	Countries	January 2014	June 2013	June 2012	June 2010	Changes in percentages		
						June 2013 /January 2014	June 2012 /June 2013	June 2010 /January 2014
1	Spain	321	294	209	81	9 %	41 %	295 %
2	Italy	188	155	109	63	22 %	41 %	196 %
3	Portugal	85	79	60	n/a	8 %	31 %	n/a
4	Romania	85	77	63	n/a	11 %	21 %	n/a
5	Poland	64	58	48	31	9 %	22 %	110 %
6	Germany	47	43	37	n/a	9 %	16 %	n/a
7	France	42	38	32	n/a	10 %	18 %	n/a
8	Greece	43	39	29	9	10 %	33 %	394 %
Other Member States		285	252	172	n/a	13 %	46 %	n/a
All Member States		1160	1035	761	n/a	12 %	36 %	n/a

Source: EURES portal (data extracted from the website http://ec.europa.eu/eures).

2.2 Trends in mobility: what do official European migration statistics show?

Changing patterns in terms of immigration into EU countries

The most recent Eurostat statistics on migration flows refer to 2012. Compared to 2008, they show sharp falls in **immigration** into Portugal (-51 %), Slovenia (-51 %), Spain (-49 %), Ireland (-34 %) and Italy (-34 %), countries all hit by the crisis. All those countries therefore experienced a decrease in the immigration rate (chart 3), for instance from 1.3 % to 0.7 % in the case of Spain and from 1.8 % to 1.2 % in the case of Ireland. Immigration flows to the Czech Republic (-68 %) and the UK (-16 %) also decreased (Table 4).

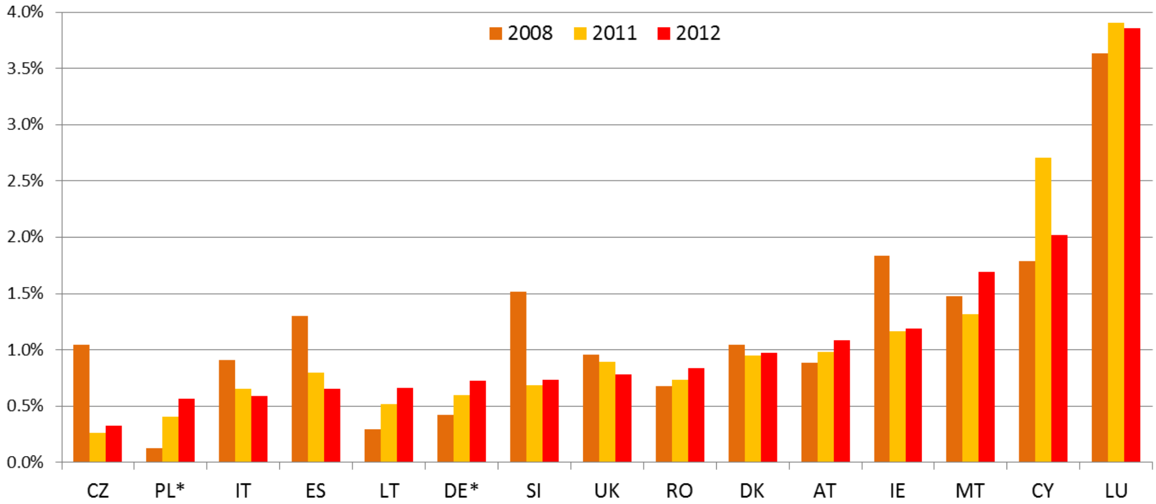
In contrast, immigration flows increased to countries with a declining or low unemployment rate, such as Germany (+71 %), Austria (+24 %), Malta (+18 %), Luxembourg (+15 %). Immigration also increased to Lithuania (+113 %), Romania (+20 %) and Poland (+15 %), partly due to the increasing number of nationals returning from abroad (see below).

Table 4: Immigration flows in absolute numbers (percentage change in total) and as a percentage of the total population of the receiving country, 2008, 2011 and 2012

	Total immigration flows			Percentage change in total		As a percentage of the population		
	2008*	2011	2012	2008*/12	2011/2012	2008	2011	2012
Belgium	N/A	144 698	147 387	N/A	2 %	N/A	1.3 %	1.3 %
Bulgaria	N/A	N/A	14 103 (p)	N/A	N/A	N/A	N/A	0.2 %
Czech Republic	108 267	27 114	34 337	-68 %	27 %	1.0 %	0.3 %	0.3 %
Denmark	57 357	52 833	54 409	-5 %	3 %	1.0 %	0.9 %	1.0 %
Germany*	346 216	489 422	592 175	71 %	21 %	0.4 %	0.6 %	0.7 %
Estonia	3 671	3 709	2 639	-28 %	-29 %	0.3 %	0.3 %	0.2 %
Ireland	82 592	53 224	54 439	-34 %	2 %	1.8 %	1.2 %	1.2 %
Greece	N/A	110 823	110 139	N/A	-1 %	N/A	1.0 %	1.0 %
Spain	599 075	371 331	304 053	-49 %	-18 %	1.3 %	0.8 %	0.7 %
France	N/A	319 816	327 431	N/A	2 %	N/A	0.5 %	0.5 %
Croatia	N/A	8 534	8 959	N/A	5 %	N/A	0.2 %	0.2 %
Italy	534 712	385 793	350 772	-34 %	-9 %	0.9 %	0.6 %	0.6 %
Cyprus	14 095	23 037	17 476	24 %	-24 %	1.8 %	2.7 %	2.0 %
Latvia	N/A	10 234	13 303	N/A	30 %	N/A	0.5 %	0.7 %
Lithuania	9 297	15 685	19 843	113 %	27 %	0.3 %	0.5 %	0.7 %
Luxembourg	17 758	20 268	20 478	15 %	1 %	3.6 %	3.9 %	3.9 %
Hungary	N/A	28 018	33 702	N/A	20 %	N/A	0.3 %	0.3 %
Malta	6 043	5 465	7 111	18 %	30 %	1.5 %	1.3 %	1.7 %
Netherlands	122 917	130 118	124 566	1 %	-4 %	0.9 %	0.8 %	0.7 %
Austria	73 772	82 230	91 557	24 %	11 %	0.9 %	1.0 %	1.1 %
Poland	189 166	157 059	217 546	15 %	39 %	0.5 %	0.4 %	0.6 %
Portugal	29 718	19 667	14 606	-51 %	-26 %	0.3 %	0.2 %	0.1 %
Romania	138 929	147 685	167 266	20 %	13 %	0.7 %	0.7 %	0.8 %
Slovenia	30 693	14 083	15 022	-51 %	7 %	1.5 %	0.7 %	0.7 %
Slovakia	N/A	N/A	5 419	N/A	N/A	N/A	N/A	0.1 %
Finland	29 114	29 481	31 278	7 %	6 %	0.5 %	0.5 %	0.6 %
Sweden	101 171	96 467	103 059	2 %	7 %	1.1 %	1.0 %	1.1 %
United Kingdom	590 242	566 044	498 040	-16 %	-12 %	1.0 %	0.9 %	0.8 %

Source: Eurostat, international migration flows [migr_imm1ctz], extracted on 25 May 2014. Note: *Due to a break in series, 2009 figures are used instead of 2008 figures for DE, NL and PL. BG: (p) = provisional value for 2012.

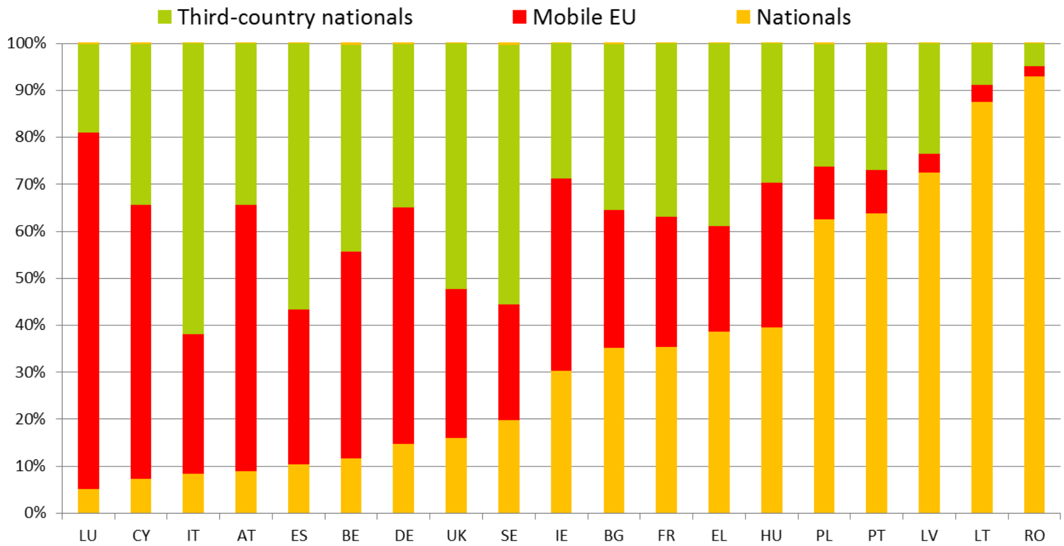
Chart 3: Immigration rate (as a percentage of the total population) for selected countries



Source: Eurostat, international migration flows [migr_imm1ctz]. * Due to a break in series, 2009 figures are used instead of 2008 figures for DE and PL.
Click here to download chart.

There are considerable differences between Member States in the composition of immigrants by group of citizenship in 2012 (chart 4). Most immigrants to Italy (62 %), Spain (57 %) and Sweden (55 %) were non-EU citizens, whereas in the case of Luxembourg (76 %), Cyprus (58 %), Austria (57 %) and Germany (50 %), they were mainly EU citizens. In contrast, immigration flows to Ireland, Bulgaria, Hungary and France were quite evenly split between their own citizens, other EU citizens and non-EU citizens. Much of the immigration that took place in 2012 was in fact return migration. In total, approximately one in four immigrants to EU Member States was a returning migrant. The proportion of returning nationals among all immigrants was relatively low in EU-15 countries and highest in central and eastern European Member States (from almost 40% in Hungary to more than 60 % in Poland, Latvia and Lithuania and up to 93 % in Romania). This is not surprising given the large outflows from those countries since the beginning of the 2000's (i.e. there is a big potential for return migration), the rise in circular migration and the adverse labour market situation in some destination countries of movers from central and eastern countries since the onset of the crisis (Spain, Ireland, Italy, Cyprus and the UK).

Chart 4: Composition of immigrants by group of citizenship for selected countries, 2012



Source: Eurostat, international migration flows [migr_imm1ctz]. Note: The countries are listed according to the percentage of return migrants i.e. nationals returning to their country of origin. 'Mobile EU citizens' refers to EU-27 citizens because the aggregate figure for the EU-28 is not yet available. The percentage is calculated for the sum of the three citizenship groupings listed, not for the total immigrant population. This is worth noting because some countries such as the NL, DE, SE and LU have a small but noticeable proportion of immigrants of unknown citizenship.
Click here to download chart.

Variation across countries in terms of emigration flows

Between 2008 and 2012, there were sharp increases in **emigration flows** out of countries such as Portugal (+155 %), Cyprus (+72 %), Lithuania (+60 %), Spain (+55 %), Ireland (+36 %) and Italy (+31 %) (table 5). During the same period, there was less emigration than before from countries such as Romania (-44 %), the UK (-25 %) and Germany (-16 %). In 2012, Cyprus (2.1 %), Luxembourg (2.0 %) and Ireland (1.9 %) had comparatively high emigration rates as a percentage of the total population, Hungary (0.2 %), Italy (0.2 %) and Germany (0.3 %) had relatively low rates (chart 5).

Table 5: Emigration flows in absolute numbers (percentage change in total) and as a percentage of the total population of the country of origin, 2008, 2011 and 2012

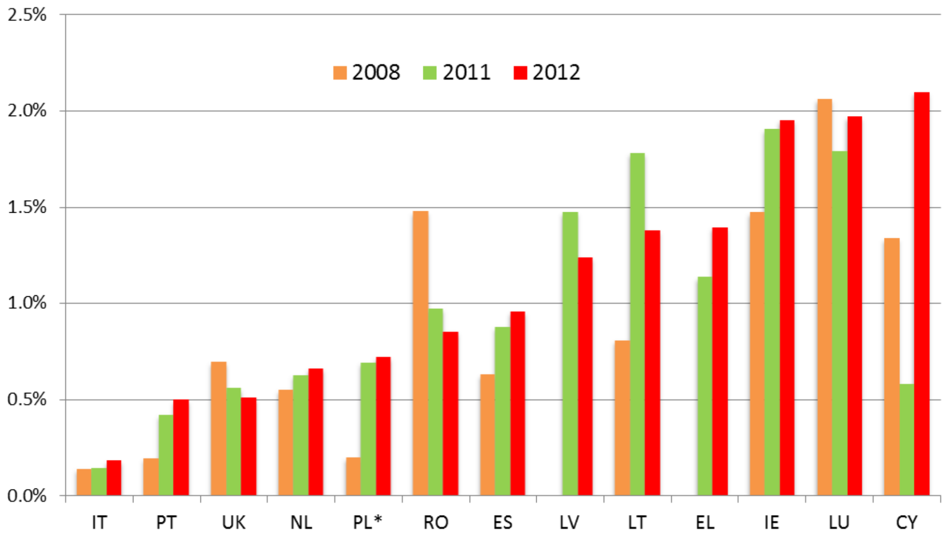
Country	Total emigration flows			Percentage change in total		As a percentage of the population		
	2008*	2011	2012	2008*/12	2011/2012	2008	2011	2012
Belgium	N/A	67,475	74,720	N/A	11%	N/A	0.60%	0.70%
Bulgaria	N/A	N/A	16,615	N/A	N/A	N/A	N/A	0.20%
Czech Republic	51,478	55,910	46,106	-10%	-18%	0.50%	0.50%	0.40%
Denmark	38,356	41,593	43,663	14%	5%	0.70%	0.70%	0.80%
Germany	286,582	249,045	240,001	-16%	-4%	0.30%	0.30%	0.30%
Estonia	4,406	6,214	6,321	43%	2%	0.30%	0.50%	0.50%
Ireland	65,934	87,053	89,436	36%	3%	1.50%	1.90%	1.90%
Greece	N/A	125,984	154,435	N/A	23%	N/A	1.10%	1.40%
Spain	288,432	409,034	446,606	55%	9%	0.60%	0.90%	1.00%
France	N/A	280,556	288,331	N/A	3%	N/A	0.40%	0.40%
Croatia	N/A	12,699	12,877	N/A	1%	N/A	0.30%	0.30%
Italy	80,947	82,461	106,216	31%	29%	0.10%	0.10%	0.20%
Cyprus	10,500	4,895	18,105	72%	270%	1.30%	0.60%	2.10%
Latvia	N/A	30,311	25,163	N/A	-17%	N/A	1.50%	1.20%
Lithuania	25,750	53,863	41,100	60%	-24%	0.80%	1.80%	1.40%
Luxembourg	10,058	9,264	10,442	4%	13%	2.10%	1.80%	2.00%
Hungary	N/A	15,100	22,880	N/A	52%	N/A	0.20%	0.20%
Malta	3,719	3,806	4,005	8%	5%	0.90%	0.90%	1.00%
Netherlands	92,825	104,201	110,431	19%	6%	0.60%	0.60%	0.70%
Austria	51,563	51,197	51,812	0%	1%	0.60%	0.60%	0.60%
Poland	229,320	265,798	275,603	20%	4%	0.60%	0.70%	0.70%
Portugal	20,357	43,998	51,958	155%	18%	0.20%	0.40%	0.50%
Romania	302,796	195,551	170,186	-44%	-13%	1.50%	1.00%	0.80%
Slovenia	12,109	12,024	14,378	19%	20%	0.60%	0.60%	0.70%
Slovakia	N/A	1,863	2,003	N/A	8%	N/A	0.00%	0.00%
Finland	13,657	12,660	13,845	1%	9%	0.30%	0.20%	0.30%
Sweden	45,294	51,179	51,747	14%	1%	0.50%	0.50%	0.50%
United Kingdom	427,207	350,703	321,217	-25%	-8%	0.70%	0.60%	0.50%

Source: Eurostat, international migration flows [migr_emi1ctz], extracted on 25 May 2014. Note: * Due to a break in series, 2009 figures are used instead of 2008 figures for DE, NL and PL.

The combination of the changes in flows (in and out) explains recent trends in net migration. In Germany, it has not been as high for many years, while net migration in Spain, Ireland, Portugal, and the Czech Republic has gone from being positive in 2008 to being negative in 2011 and 2012.

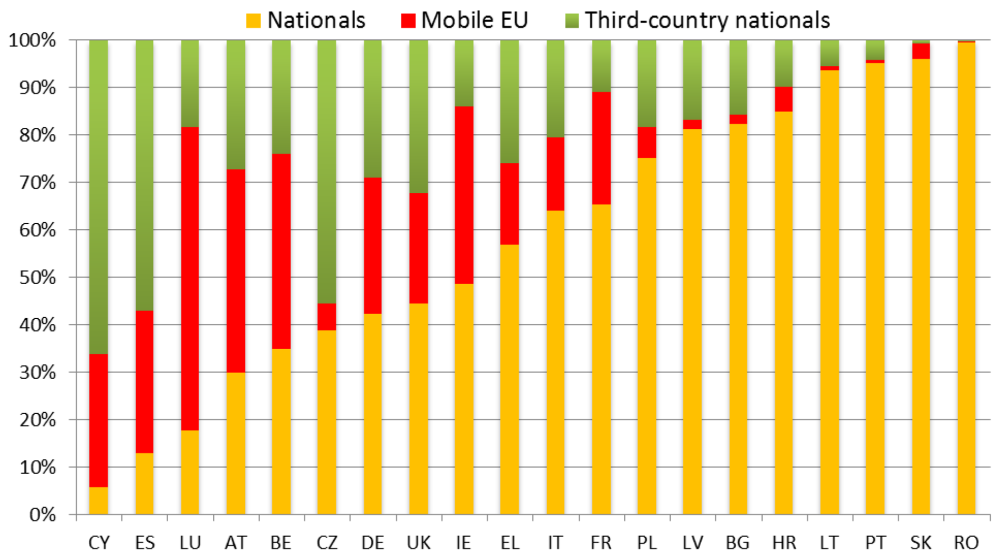
Similar to immigration, the distribution of emigration flows in terms of citizenship varies largely across countries. While most of the emigrants from Portugal and central and eastern Member States are nationals leaving their country, this is not the case in Spain, the Czech Republic and Cyprus where most emigrants are non-EU nationals (or come from elsewhere in the EU). In the case of Luxembourg, Austria and Belgium, many are EU nationals (chart 6).

Chart 5: Emigration rate (as a percentage of the total population) for selected countries



Source: Eurostat, international migration flows [migr_emi1ctz]. Note: Data missing for EL and LV in 2008.
* Due to a break in series, 2009 figures are used instead of 2008 figures for PL.
Click here to download chart.

Chart 6: Composition of emigrants by group of citizenship, 2012



Source: Eurostat, international migration flows [migr_emi1ctz]. Note: The countries are listed according to the percentage of return migrants. 'Mobile EU citizens' refers to EU-27 citizens because the aggregate figure for the EU-28 is not yet available. The percentage is calculated out of the sum of the three citizenship groupings listed, not for the total immigrant population. Click here to download chart.

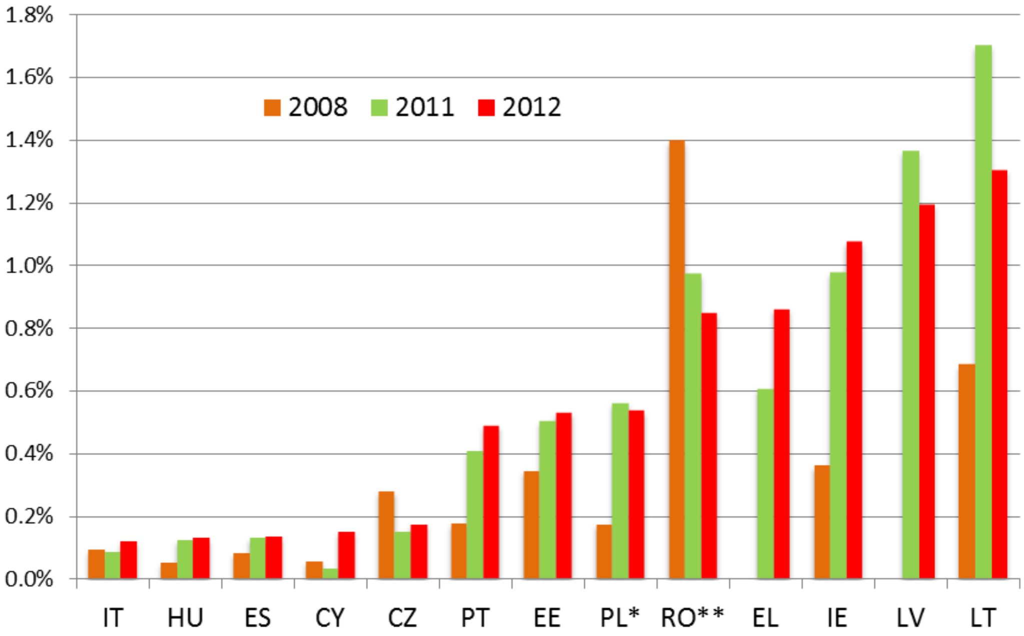
This means that in some countries the increase in emigration flows is the result of foreigners' leaving their country of residence to return to their own country or go elsewhere, rather than of nationals' emigrating. In countries such as Cyprus and Spain, the increase is due to the high proportion of migrants in the population and the significant impact of the crisis on their employment situation.

In 2012, the emigration rate **among nationals only** (chart 7) was:

- high but decreasing in Lithuania, Latvia, Romania and Poland;
- high and increasing in Ireland, Greece and to some extent Portugal;

- low but slightly increasing in Cyprus (0.2 %) and Hungary, Spain and Italy (0.1 %).

Chart 7: Emigration rate <u>among nationals</u> (as a percentage of the total population of nationals) for selected countries



Source: Eurostat, international migration flows [migr_emi1ctz]. Note: Data missing for HU and LV for 2008.*Due to a break in series, 2009 figures are used instead of 2008 figures for PL, and 2010 figures for EL.** Data for 2012 was used for the population of nationals in RO in 2011. Click here to download chart.

This shows that the labour market has adjusted to crisis conditions differently across countries. In the Baltic countries, Ireland and to some extent Portugal and Greece, the number of nationals emigrating has increased. In Spain and Cyprus, the adjustment took the form of outflows of foreign citizens (leaving their host country to return home or go elsewhere). Nevertheless, in both groups of countries, the adjustment also took the form of decreasing inflows, as the analysis of immigration flows above shows (chart 3 and 4).

In table 6, Eurostat also provides data on emigrants' next country of residence. The table shows that the proportion of emigrants varies greatly in terms of EU or non-EU destination countries. This is in part due to the very different composition of emigrants by citizenship as shown above.

For example, in Spain, where most emigrants were returning migrants, 61 % of them went back to non-EU countries (in particular Latin American countries and Morocco). This proportion was even higher in the case of those emigrating from the Czech Republic (71 %) and Cyprus (70 %), where many emigrants are also returning migrants. In countries where emigrants were mainly nationals, such as Portugal and central and eastern Member States (the Baltic countries, Poland, Slovakia, Romania and Bulgaria), they went mainly (66%-95%) to other EU countries.

In other countries in which emigrants are evenly split between nationals and foreigners (for instance Greece, Ireland, Italy, the UK and Germany), it is more difficult to establish a link with the country of destination. Nevertheless, many emigrants from France (67 %), the UK (64 %), Germany (53 %) and Ireland (46 %) chose non-EU countries as their destination. The patterns of migration by EU citizens to non-EU countries are analysed in detail in the last section of this Supplement, using comprehensive national data from the destination countries.

Finally, certain flows clearly correspond to mobile EU citizens returning home. This appears to be true of emigration from Italy and Spain to Romania, from Spain to Portugal and Bulgaria and from Ireland to Poland, Latvia and Lithuania.

Table 6: Country of destination of emigrants from the EU during 2012 (in thousands and as a percentage of total emigration)

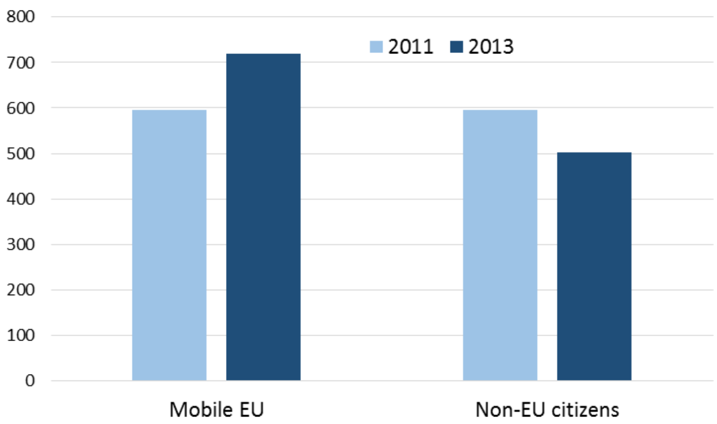
Country	EU-27	Non EU-27	EU-27, of whom:	Non-EU-27, of whom:
Belgium	64%	36%	FR (20%), NL (10%), DE (6%)	USA (5%), Switzerland (2%), Turkey (2%)
Bulgaria	68%	32%	ES (14%), IT (12%), DE (12%)	Turkey (12%), USA (4%), Russia (4%)
Czech Republic	29%	71%	N/A	N/A
Denmark	46%	52%	DE (8%), SE (7%), PL (4%)	USA (10%), Norway (7%), China (3%)
Germany	47%	53%	N/A	N/A
Estonia	93%	7%	FI (77%), UK (6%), DE (3%)	Russia (3%), Norway (1%), USA (1%)
Ireland	54%	46%	UK (23%), PL (8%), FR (4%)	Australia (16%), USA (8%), Canada (5%)
Greece	60%	40%	N/A	N/A
Spain	39%	61%	RO (14%), FR (5%), UK (4%)	Morocco (8%), Ecuador (7%), Colombia (4%)
France	28%	67%	N/A	N/A
Croatia	30%	67%	DE (15%), AT (4%), IT (3%)	Serbia (31%), Bosnia and Herzegovina (25%), Switzerland (2%)
Italy	52%	48%	DE (11%), RO (9%), UK (8%)	Switzerland (8%), USA (5%), Brazil (3%)
Cyprus	30%	70%	N/A	N/A
Latvia	76%	24%	N/A	N/A
Lithuania	79%	21%	UK (48%), IE (9%), DE (8%)	Norway (8%), USA (4%), Russia (2%)
Luxembourg	87%	13%	N/A	N/A
Hungary	85%	15%	N/A	N/A
Malta	66%	34%	N/A	N/A
Netherlands	54%	46%	DE (13%), BE (10%), UK (8%)	USA (6%), Turkey (4%), China (3%)
Austria	60%	40%	N/A	N/A
Poland	69%	31%	N/A	N/A
Portugal	66%	34%	N/A	N/A
Romania	95%	5%	N/A	N/A
Slovenia	45%	55%	DE (17%), AT (9%), HR (9%)	Serbia (15%), Bosnia and Herzegovina (7%), FYROM (5%)
Slovakia	84%	16%	CZ (31%), AT (22%), DE (10%)	Switzerland (4%), USA (4%), Canada (2%)
Finland	63%	35%	SE (19%), UK (9%), DE (7%)	USA (7%), Norway (4%), China (3%)
Sweden	40%	50%	DK (9%), UK (6%), FI (5%)	Norway (14%), USA (6%), China (4%)
United Kingdom	36%	64%	N/A	N/A

Source: Eurostat migration statistics [migr_emi3nxt].

2.3 Recent changes in intra-EU labour mobility: evidence from the Labour Force Survey

EU Labour Force Survey data completes the picture of the latest trends in mobility, focusing on the *workforce* rather than the *overall population*. Data for 2013 on the number of recently established (i.e. those who have been living in a Member State for less than two years[11]) EU citizens who are economically active confirms the rebound of mobility flows (+21 %) in recent years (2012–13) compared to the previous period (2010–11), while the number of newcomers from non-EU countries went on falling (-16 %), see chart 8. As a reminder, previous analysis has shown that, in comparison to the high flows recorded before 2008, from 2009 onwards intra-EU mobility and migration from outside the EU decreased sharply on account of the global recession.[12]

Chart 8: Economically active EU and non-EU citizens who have been living for less than 2 years in an EU country (in thousands)



Source: DG EMPL calculations based on Eurostat EU-LFS.
Click here to download chart.

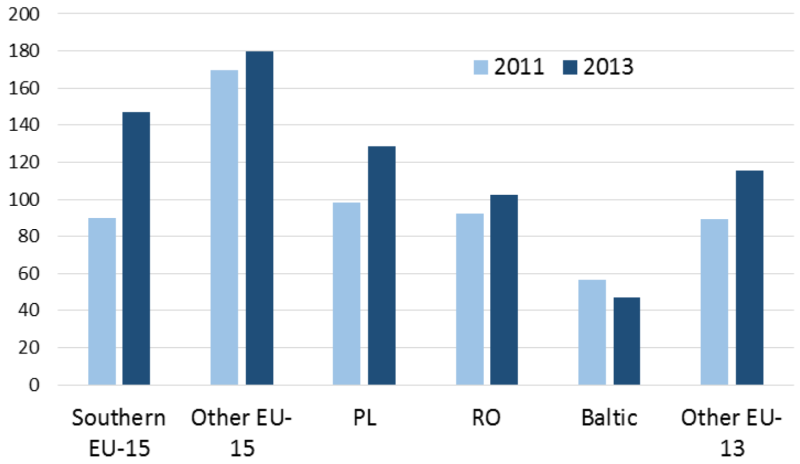
These overall trends differ markedly across the various countries of origin (chart 9). Compared to the previous period (2010–11), flows originating in the southern EU-15 Member States have surged (+64 %), while those originating in other EU-15 countries remained much the same as before (+6 %). Flows from central and eastern Member States decreased sharply at the start of the crisis, but partly recovered in the most recent period (2012-13) with +31 % from Poland and +29 % from the other EU-13 countries (excluding Romania and the Baltic countries). This latest trend can be attributed to the end of the transitional arrangements in Germany and Austria in May 2011 for EU-8 workers and to the economic attractiveness of those destination countries.[13] In contrast, the change was more limited with regard to Romania (+11 %) and even negative in the case of the Baltic countries (-17 %).

At the level of individual countries, mobility flows during 2012–13 were much higher than during the previous two-year period (2010–11) from several countries severely affected by the crisis: Greece (+150 %), Spain (+99 %), Hungary (+78 %) and Portugal (+53 %), followed by Poland (+30 %), France (+25 %) and Italy (+23 %) (chart 10). Far fewer workers than was previously the case moved to other EU countries from Lithuania (-16 %), Ireland (-19 %) and Latvia (-28 %), countries that had experienced large outflows at the start of the crisis and in which the

[11] This section analyses recent trends in mobility by comparing the number of recent intra-EU movers in the period 2012–13 to the number in the previous two-year period (2010–11). Recent intra-EU movers are defined as those living since less than two years in another EU country than their own (i.e. in terms of citizenship). The EU-LFS variable used is YEARESID (years of residence in the country). Analysis of this variable shows that in some countries (France, Italy, Austria, the Netherlands), it under-estimates the number of most recent migrants (i.e. those who moved to the country less than two years ago). This is most probably due to the difficulty of including them into the sample. The next section therefore focuses on a longer period (less than five years) in order to get more reliable results, in particular for the distribution among countries of destination.
[12] European Commission, EU ESSQR, June 2013, pp. 38-51.
[13] If one excludes Germany and Austria as destination countries, the number of recent intra-EU movers from Poland and other EU-13 countries (excluding Romania and the Baltic countries) stagnated in 2012–13 compared to the previous two-year period (2010–11).

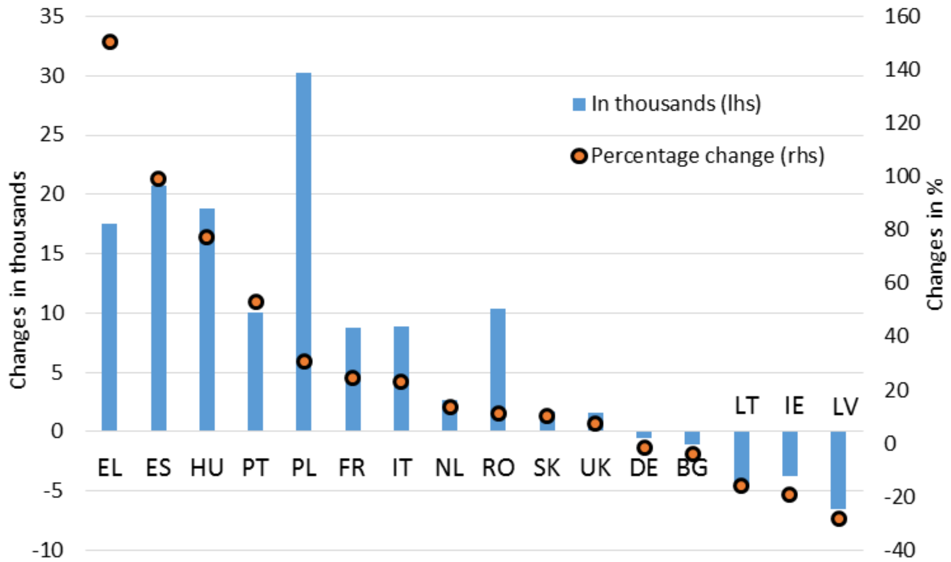
economic situation has since improved. While there may be numerous factors behind the changes in outflows of economically active people towards other Member States, there is a strong correlation with the changes in unemployment levels in the various countries of origin.[14]

Chart 9: Economically active EU foreigners who have been living for less than 2 years in an EU country, by group of countries of origin (in thousands)



Source: DG EMPL calculations based on Eurostat EU-LFS.
Click here to download chart.

Chart 10: Changes over 2011-13 in the number of economically active EU foreigners who have been living for less than 2 years in an EU country, by country of origin (in thousands and as a percentage)



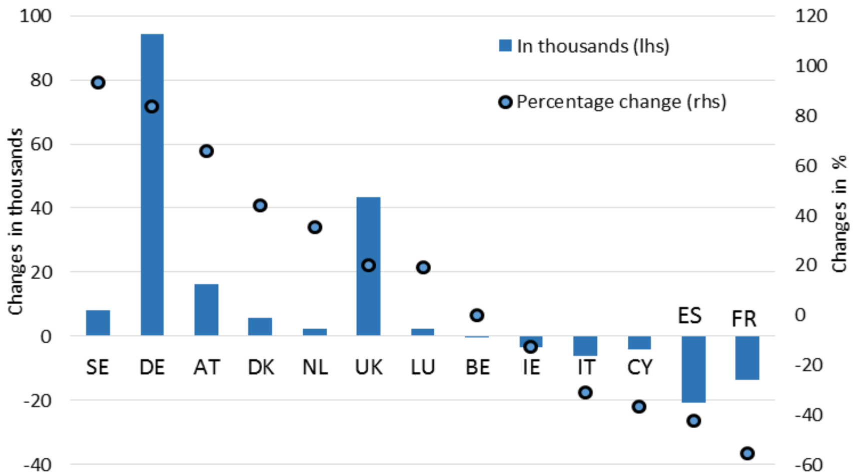
Source: DG EMPL calculations based on Eurostat EU-LFS.
Click here to download chart.

As far as destination countries are concerned, compared to 2010–11, the most recent period (2012–13) saw a strong increase in intra-EU mobility flows towards Sweden (+93 %), Germany

[14] The coefficient of correlation (for the 16 Member States for which data is available) between the changes (between 2010-11 and 2012-13) in the outflows of economically active people to other Member States and the changes (between 2010 and 2012) in the unemployment rate in the countries of origin in question is 0.84 (R^2=0.71).

(+83 %), Austria (+66 %) and to a lesser extent Denmark (+44 %), the Netherlands (+35 %), the UK (+20 %) and Luxembourg (+19 %).[15] In contrast, flows decreased towards Ireland (-13 %), Italy (-31 %), Cyprus (-37 %), Spain (-42 %) and France (-56 %). The detailed distribution of flows per destination country (and group of countries of origin) is analysed below, based on a longer period (the last five years rather than the last two). This is to improve the quality of the data (the years of residence variable is more reliable for longer periods of time) and to be able to compare the pre- and post-crisis periods.

Chart 11: Changes in the number of economically active EU foreigners who have been living for less than 2 years in an EU country, by country of destination (in thousands and as a percentage) — 2013 compared to 2011



Source: DG EMPL calculations based on Eurostat EU-LFS.
Click here to download chart.

2.4 The characteristics of mobility flows since the onset of the crisis (2009-13) compared to the previous period (2004-08)

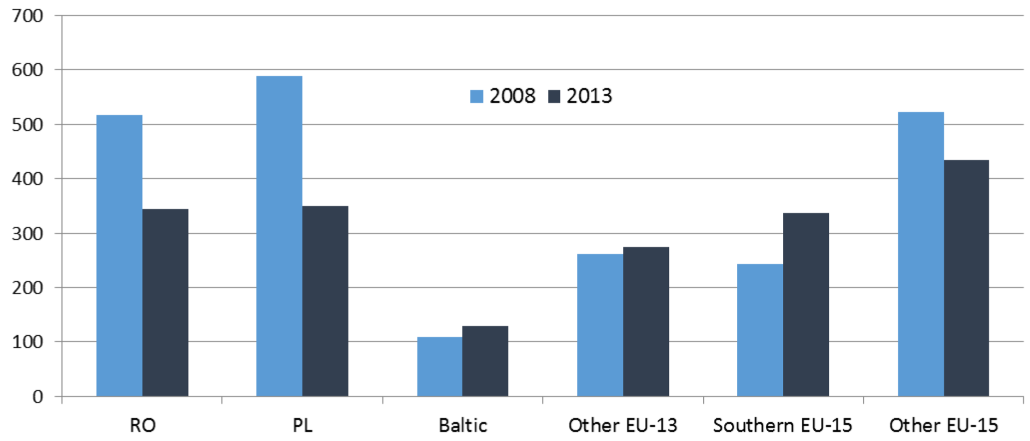
Mobility flows have not only fluctuated according to the economic and employment situation, they have also changed in terms of their composition (origin/destination, educational level and other socio-demographic characteristics). This section analyses these developments by comparing the period since the onset of the crisis (2009-13) to the previous five years (2004-08), a period characterised both by economic growth in most EU Member States and a large wave of post-enlargement mobility.

As already underlined in previous analysis, mobility flows have declined (by 16 %) overall since 2009 compared to 2004-08 (see Chart 12). This was due both to the crisis and a weakening of the impact of 2004 and 2007 enlargements. However, this trend has not been uniform across **origin countries**. Compared to 2004-08, mobility flows decreased from Poland (-41 %) and Romania (-33 %), but also from the (non-southern) EU-15 countries (-17 %). By contrast, they increased from the Baltic countries (+19 %) and from the southern EU-15 countries especially (+39 %). Numbers originating in other EU-13 countries increased only slightly (+5 %), a slow-down as a result of a decrease for most of these countries (in particular Bulgaria (-16 %) and Slovakia (-28 %)) that is offset by a strong increase for Hungary (+106 %).

[15] This section focuses on recent trends, i.e. the flows during 2012–13 compared to the previous two years (2010–11). The reference period (2010–11) was a low-mobility phase compared to that before the crisis (2007–08). If one compares flows during 2012–13 to those recorded in 2007–08, intra-EU mobility flows have decreased overall (-25 %), especially those originating in Poland (-58 %) and Romania (-38 %). In terms of destination countries, only Germany (+45 %) and Austria (+78 %) recorded a significant increase between those two periods, while flows to the UK decreased (-28 %) and those to Ireland (-80 %) and Spain (-79 %) dropped significantly.

In terms of overall share, southern movers made up 18 % of the flows in 2009-13 compared to 11 % previously, while EU-13 movers remain the largest group of mobile EU workers despite a similar decline in their share (from 66 % in 2004-08 to 59 % in 2009-13).

Chart 12: Economically active EU foreigners, residing <u>for < 5 years</u> in an EU country, by group of origin countries (in thousands)



Source: DG EMPL calculations based on Eurostat EU-LFS.
Click here to download chart.

Another major change compared to the pre-crisis period has been the distribution of intra-EU movers across **destination countries**: while the UK's share has remained fairly stable (around 30 %), this has been rising for Germany (from 13 to 25 %), Belgium (from 4 to 6 %) and Austria (from 3 to 5 %)[16] — as opposed to Spain and Ireland, which comprised a much lower share than before (see Table 7).

These trends vary however across citizenship groups. For instance, mobility from EU-10 countries seems to have gradually shifted from Ireland (and the UK to some extent) to Germany and Austria, while the most spectacular change has been the drop in Spain's share for EU-2 movers (from 57 % to 12 %) and the resulting shift to other countries, in particular Germany, the UK and Italy as well as Belgium and Austria. In 2009-13, the main destination countries for movers from the southern Member States were the UK (29 %) and Germany (26 % compared to 16 % previously) followed by France (17 %), with only a small proportion still moving to Spain (7 % compared to 17 % previously).

Table 7: Distribution of economically active intra-EU movers (established for less than 5 years in 2008 and 2013) — by destination country and citizenship group, as a % of the total

Destination	All EU-28 movers		EU-10		EU-2		Southern EU-15		Other EU-15	
country	2008	2013	2008	2013	2008	2013	2008	2013	2008	2013
UK	30	31	54	43	5	18	29	29	23	25
DE	13	25	13	29	6	21	16	26	18	21
IT	6	6	2	1	19	25	(1)	:	2	1
BE	4	6	2	3	1	6	5	6	10	11
ES	20	6	2	1	57	12	17	7	9	6
FR	6	6	(1)	2	2	2	20	17	10	6
AT	3	5	2	5	1	3	(2)	2	7	8
IE	9	3	18	4	1	1	4	2	6	3
Others	9	13	6	11	7	12	8	10	15	19

Source: DG EMPL calculations based on Eurostat EU-LFS. Note: Figures in bracket lack reliability due to small sample size.

[16] The increase in the share of the 'others' category (from 9 to 13 %, see Table 7) is almost entirely due to an increase in the share of Nordic countries (DK, SE and FI combined) — from 2.4 % in 2004-08 to 5.7 % in 2009-13.

In 2009-13, the majority of economically active intra-EU movers were **men** (56 %),[17] a very slight increase on the 2004-08 period (55 %). This trend was driven by an increase in the proportion of men among movers from the EU-2 countries (from 50 % to 52 %) and in particular from southern EU-15 countries (from 56 % to 60 %), and was only partly offset by a decrease among movers from the EU-10 (from 56 % to 54 %). The highest proportion of men is found among intra-EU movers from 'other EU-15' countries (58 %, unchanged compared to 2004-08).

In terms of age, intra-EU movers in 2009-13 were predominantly **young** — 63 % of them were aged 15-34, while this age category only accounted for around 34 % of the labour force in the EU (average over 2009-13). Nevertheless, intra-EU movers in the recent period tended to be 'less young' than before, with the proportion of those aged 15-24 declining from 20 % to 15 % (and from 28 % to 26 % for those aged 25-29), see table 8. This seems to be a general phenomenon as there was a decrease in the share of young people for all groups of origin countries, and is therefore not due to the change in the distribution by origin countries highlighted above. This trend may be surprising as it is to be expected that rises in youth unemployment since 2008 in many countries would have increased incentives to look for a job abroad. However, as youth unemployment has also affected the labour market of many destination countries, prospects abroad are not necessarily attractive for potential movers of a young age. By contrast, the age category 35-54 has increased its share by 3 pp (from 31 to 34 %) between the two periods, with a particularly marked increase in those originating in the southern EU Member States (from 31 % to 38 %, or +8 pp).

Table 8: Distribution of economically active intra-EU movers (established for less than 5 years in 2008 and 2013) by age group, as a % of the total

	2008					2013				
Intra-EU movers from:	15-24	25-29	30-34	35-54	55+	15-24	25-29	30-34	35-54	55+
All EU-28 MS	20	28	19	31	2	15	26	21	34	4
EU-10	23	33	19	23	1	18	28	21	29	4
EU-2	23	24	20	31	1	17	26	20	34	3
Southern EU-15	15	27	24	31	3	12	26	22	38	2
Other EU-15	13	23	18	42	4	12	24	21	38	5

Source: DG EMPL calculations based on Eurostat EU-LFS.

Finally, a striking change compared to the pre-crisis period has been the **increase in the overall level of education**. The proportion of highly educated among recent intra-EU movers has increased substantially (from 27 % in 2008 to 41 % in 2013) and this applies to all citizenship groups. On the contrary, the proportion of movers with a medium level of education has decreased markedly for all groups, while the proportion of movers with a low level of education decreased substantially only for the group of movers originating in the southern EU countries. The increase in the average level of education partly reflects the overall up-skilling of the EU labour force.[18] However, one should also consider the strong changes in overall labour demand by educational level and the shift in job structure since the crisis started in 2008, in particular the decline of the construction and manufacturing sectors, which employ many workers with a medium level of education, including mobile EU workers.

Differences in the level of education between the various groups of origin countries remained largely the same as before, with a predominance of people having a medium level of education among those originating in the EU-10 and EU-2 countries (despite a sharp decline) and a high and increasing share of tertiary graduates among those coming from southern EU countries (49 %) and other EU-15 countries (66 %). As far as EU-2 movers are concerned, the proportion with a low level of education remained high but decreased slightly (from 33 to 31 %), while one quarter of them were tertiary graduates (compared to 16 % previously).

[17] This does not contradict the finding of the 'Mobility in Europe' 2013 report quoted in Box 1— that women make up the majority of mobile EU citizens —, as the report focuses on all movers whereas the current analysis only covers those who are economically active, and more likely to be men.
[18] The proportion of highly educated among the EU labour force has increased from 26 % to 30 % between 2008 and 2013.

Table 9: Distribution of economically active intra-EU movers (established for less than 5 years in 2008 and 2013) by level of education and citizenship groups, as a % of the total

Intra-EU movers from:	2008			2013		
	Low	Medium	High	Low	Medium	High
All EU-28 MS	22	51	27	21	38	41
EU-10	18	64	18	20	49	30
EU-2	33	52	16	31	44	25
Southern EU-15	33	30	37	26	25	49
Other EU-15	11	38	50	8	26	66

Source: DG EMPL calculations based on Eurostat EU-LFS

In terms of occupation groups, the proportion of recent intra-EU movers working in 'high-skilled occupations' (ISCO 1-3) increased from 26 % to 34 % between 2008 and 2013.[19] Such significant change has not been a general trend at EU level[20] and therefore reflects the sharp increase in the proportion of tertiary educated among the recent intra-EU movers mentioned above. This means that most of the increase in the average level of education seems to have transmitted in terms of higher skilled occupations. Interestingly, the 'over-qualification rate' (i.e. the proportion of highly educated (ISCED 5-6) employed in low (ISCO 9) or medium-skilled (ISCO 4-8) occupations) decreased from 38 % in 2008 to 35 % in 2013. This apparent slight improvement in the 'matching process' stems notably from a decline in the indicator (from a very high level) for EU-2 movers (from 76.0 % to 59.0 %) which itself is mainly due to drop of the share of Spain as destination countries of EU-2 movers. In contrast, the ratio worsened slightly (i.e. increased) in the case of southern movers (from 26.6 % to 28.4 %). This contrasts with a low and declining over-qualification rate for movers from other EU-15 countries (from 17.8 % to 16.6 %) and a slightly decreasing rate (but still very high) for EU-10 movers (from 58.4 % to 56.2 %).

In terms of sectors, there are fewer (recent) intra-EU movers than before working in construction (from 14.9 % to 10.4 % or -4.5 pp) and manufacturing (from 16.3 % to 14.9 % or -1.4 pp) as well as domestic workers (from 6.0% to 4.1% or – 2.0 pp), and more in the service sectors such as 'Accommodation and food services activities' (from 11.5 % to 13.1 % or +1.6 pp), 'Administrative and support service activities' (from 6.4 % to 8.6 % or +2.2pp), 'Professional, scientific and technical activities' (from 4.1 % to 5.5 % or +1.4 pp) and Education (from 3.6 % to 4.9 % or +1.4 pp). 'Information and communication' and 'Health and social work' have also seen their proportions in employment of recent intra-EU movers increasing. These developments reflect the trends observed in the EU economies overall since the onset of the crisis, but with more pronounced changes in percentage terms. In other words, employment among intra-EU movers tended to accentuate the overall trends, seemingly confirming that their employment acts as a buffer for the economies of destination countries.

2.5 Recent trends in intra-EU mobility: lessons from national data for Germany and the UK

As underlined above, Germany and the UK are the two main destinations for recent intra-EU movers, so it is interesting to look at national data for these two countries (both official migration statistics and administrative data based on social security records) as they provide more recent/relevant trends than EU-wide datasets.

Trends in Germany

According to national statistics,[21] immigration to Germany has risen significantly over recent years, from 574 000 in 2008 to 966 000 in 2012, and to 1 108 000 in 2013.[22] EU citizens

[19] By contrast, the proportion of those employed in medium-skilled occupations (ISCO 4-8) dropped (from 50 % to 43 %) while the weight of 'elementary occupations' only decreased slightly (from 24 % to 23 %).

[20] Overall, the proportion of persons working in high-skilled occupations at EU level increased very slightly, from 39% in 2008 to 40% in 2013.

[21] Provisional 2013 data released in May 2014 by the German statistical office (www.destatis.de).

[22] These figures greatly exceed those published by Eurostat as they correspond to the definition of immigrants used in German national statistics, i.e. those 'staying at least three months', versus 'twelve months' in the internationally agreed definition of migration, used by Eurostat. Consequently, net migration figures are well below the net gross inflows, as the short duration considered in those statistics also results in large numbers as far as outflows are concerned.

accounted for two thirds of immigrants in 2013 — and for more than 70 % of the net increase in immigration to Germany since 2008.

Similar to 2012, most EU citizens migrating to Germany in 2013 came from the EU-13 countries (71 %), four countries in particular (Poland, Romania, Bulgaria and Hungary). However, the sharpest increase in percentage terms was for those originating in Croatia, probably on account of its recent EU accession.

Large and generally rising numbers of migrants came from the four southern EU countries[23] (141 000 compared to 118 000 or +20 %) — there was a strong increase from Italy (+15 400 or + 36 %), a moderate one from Spain (+6 600 or +22 %) and Portugal (+1 900 or +16 %) and a slight decline from Greece (-700 or -2 %). Compared to 2008, inflows quadrupled for Greece and Spain, tripled for Italy and more than doubled for Portugal. Finally, figures on net migration (rather than total inflow) confirm that citizens from the southern Member States migrating to Germany are longer term migrants than EU-13 citizens.[24]

Table 10: Immigration and net migration to Germany in 2012 and 2013 (in thousands and changes compared to 2012), for selected citizenships

	Inflows				Net migration			
			changes				changes	
Country of origin	2013	2012	in abs.number	in %	2013	2012	in abs.number	in %
Poland	189,1	176,4	12,7	7,2	+71.7	+68.1	+3.5	5,2
Romania	134,5	116,2	18,3	15,8	+50.2	+45.7	+4.5	10,0
Bulgaria	59,0	58,5	0,4	0,8	+21.7	+25.0	-3.3	-13,2
Hungary	58,1	53,9	4,2	7,7	+24.4	+26.2	-1.7	-6,7
Croatia	24,8	12,6	12,2	97,1	+12.6	+1.1	+11.5	1050,6
Other EU-13	52,0	37,4	14,6	38,9	+20.2	+20.6	-0.4	-2,0
Italy	57,5	42,2	15,4	36,4	+32.3	+21.3	+11.1	52,1
Spain	36,5	29,9	6,6	22,1	+22.4	+18.8	+3.6	19,2
Greece	33,4	34,1	-0,7	-2,1	+20.0	+22.0	-1.9	-8,8
Portugal	13,6	11,8	1,9	16,0	+7.0	+6.3	+0.7	11,4
Other EU-15	68,6	65,5	3,1	4,7	+21.3	+20.4	+0.9	4,2
All EU MS	**727,1**	**638,4**	**88,7**	**13,9**	**+303.9**	**+275.5**	**+28.4**	**10,3**
Non-EU countries	209,6	183,4	26,2	14,3	+103.0	+88.7	+14.3	16,1
All countries	1108,1	965,9	142,2	14,7	+459.2	+387.1	+72.0	18,6

Source: German migration statistics (2013 are provisional data).

In order to focus on migration for work purposes only, a reliable and up-to-date source of information is the number of foreigners contributing to German social security. The data show a strong rise in the number of citizens from southern Member States[25] working in Germany since the start of 2010 (+113 000 or +28 %), with a particularly marked rise over the past year of +37 000, or +8 % (see Table 11). The rise since 2010 has been most pronounced among Spaniards (+58 %), while the biggest rises in absolute terms were among those from Italy (+43 000) and Greece (+36 000).

[23] As a result, migration from the southern EU countries, as a proportion of total migration from the EU-28 Member States to Germany, increased from 12 % in 2008 to 18 % in 2012, and to 19 % in 2013.
[24] Indeed, the ratio net migration / inflows is around 59 % for southern European citizens compared to around 39 % for citizens from the EU-13 countries, signalling a higher return migration for the latter.
[25] It should be noted that it is difficult to assess whether the observed changes in employment reflect only new arrivals or also longer-term residents moving from unemployment (or inactivity) into employment.

Table 11: Foreigners employed in Germany, for selected citizenships (social security data), in thousands (value in the month of March)

Workers with the citizenship of:	2010	2011	2012	2013	2014	Changes 2010-2014		Changes 2013-14	
						in thousands	in %	in thousands	in %
Southern EU MS	399	417	442	475	512	113	28	37	8
Italy	211	219	228	238	253	43	20	15	6
Portugal	49	51	54	58	62	12	25	4	7
Spain	39	41	45	52	61	22	58	8	16
Greece	100	106	115	127	136	36	36	10	8
EU-8	186	207	302	372	449	263	142	77	21
Poland	125	140	201	241	291	166	133	49	20
Hungary	17	19	33	49	65	48	281	16	33
EU-2	65	78	99	124	186	121	188	62	50
Romania	46	55	71	89	132	86	185	43	48
Bulgaria	19	22	28	35	54	36	193	19	54

Source: Bundesagentur für Arbeit (Statistik May 2014).
Notes: Mini-jobs are included, but not civil servants or self-employed. Values for individual countries in March 2014 are not available and are estimates by the Bundesagentur für Arbeit.

The rising trends have been even sharper for workers coming from the EU-8 countries (+263 000 or +142 % over 2010-14, with the largest numbers from Poland and Hungary) and from the EU-2 countries (+121 000 or +188 %). The latter figures reflect surges in the past year (March 2013-March 2014) for Romanians (+43 000 or +48 %) and Bulgarians (+19 000 or +54 %) that, in absolute terms, are equivalent to the increase recorded over the previous three-year period (2010-13). The pronounced trend in the past year is probably due to transitional arrangements for EU-2 workers ending in January 2014.[26] Indeed, the increase in the number of EU-2 workers between December 2013 and March 2014 (+49 000) accounts for 80 % of the year-on-year increase (+62 000 between March 2013 and March 2014) and is 3.5 times higher than the increase recorded in the first quarter of the previous year (i.e. between December 2012 and March 2013). Nevertheless, the rise recorded in the first quarter of 2014 does not necessarily reflect only inflows of workers from the EU-2 countries since 1 January and may also be due to a 'regularisation effect' of EU-2 workers already living/working in Germany — including those who were previously self-employed on account of restrictions on salaried employment. Indeed the experience of restrictions for EU-8 workers in Germany suggests that, before May 2011, many of them were self-employed which stopped being the case after restrictions were lifted.[27]

Finally, these figures can also be used to assess labour mobility to Germany from southern Member States as a proportion of those unemployed in those (origin) countries. The yearly increase (March 2013-March 2014) in the number of citizens from southern EU countries working in Germany as a ratio of the number of unemployed in their origin countries (in the first quarter of 2013) was relatively limited (0.3 %), though it varies across countries — from 0.1 % for Spain, 0.4 % for Portugal and 0.5 % for Italy to the highest ratio of 0.7 % for Greece (but lower than the 1.1 % reached the year before). In conclusion, despite a steady increase in the number of southern workers in Germany, this mobility still plays rather a limited role in relieving the labour market pressure of unemployment in the origin countries, with some variations across countries. This confirms recent evidence that the labour market adjustment in the euro area through mobility/migration is rather limited in % of active population of origin/destination countries, notably because the main adjustments occurred through changes in flows from/to EU-12 and non-EU countries, rather than through intra-euro area movements.[28]

[26] For further analysis of EU-2 workers in Germany, see the IAB analysis from May 2014 available at: http://doku.iab.de/arbeitsmarktdaten/Zuwanderungsmonitor_1405.pdf.
[27] For instance, EU-LFS data confirm that the share of self-employed among EU-8 workers recently established (since less than 2 years) in Germany decreased from 27% in 2008 to 14% in 2013. In the case of EU-2 workers, this share was still rather high (26%) in 2013 (i.e. before restrictions were lifted).
[28] European Commission, Employment and Social Developments in Europe Review 2013, chapter 5, Box 3, p.286.

Trends in the UK

UK official migration statistics show that net migration to the UK in 2013 was approximately 212 000, compared to 177 000 in 2012, a 20 % increase that is, however, not statistically significant. According to the UK ONS, 'recent patterns of net migration over the last two years show an increase' but 'net migration has continued to be lower than the general level of net migration since 2004'.[29]

There was an increase in people coming from the EU-8 countries (from 60 000 to 70 000 or +17 %), although it is worth noting that a considerable number of EU-8 citizens emigrated from the UK, making their net migration level approximately 44 000 in 2013, not a statistically significant increase compared to the 30 000 in 2012. In contrast, the UK saw a slight drop in arrivals from many non-EU countries. Inflows from EU-15 countries rose from 85 000 to 104 000 (+22 %). Migration from the EU-2 countries to the UK rose from 9 000 in 2012 to 23 000 in 2013 (+155 %), according to the International Passenger Survey (IPS)[30]. Of these, 16 000 immigrated for work-related reasons, of which 11 000 reported having a definite job, which marks a significant increase of 2 000 on the previous year.

To obtain data broken down by individual EU country and have access to more recent data, it is possible to use the number of National Insurance Numbers[31] (NINo) allocated to foreigners. These data show that numbers (in 2014/13 compared to 2013/12) have increased sharply in the case of Romania (+163 %), Bulgaria (71 %), Italy (+28 %), Poland (+12 %) and Portugal (+11 %), in contrast to stagnation or decline for the other top 10 EU countries (see Table 12). The highest inflows from EU Member States are from Poland (101 900), Romania (46 900) and Spain (45 600).

Separate NINo figures are also available for the first quarter of 2014, which enables migration levels from the EU-2 countries to be measured since restrictions on the employment of EU-2 workers ended on 1 January 2014. The number of NiNos allocated to Romanian (Bulgarian) workers has reached 34 900 (10 400) in the first quarter of 2014 compared to 5 900 (2 500) in the first quarter of 2013. However, the process of obtaining a NINo involves satisfying a set of criteria, which means that the process can take a number of weeks, months or even years from the time a person arrives in the UK. In fact, the UK Department for Work and Pensions confirm that 78 % of EU-2 nationals that registered for a NINo in the first quarter of 2014 had arrived to the UK prior to 1 January.[32] The high figures recorded in the first quarter of 2014 therefore mainly reflect past migration. This conclusion is confirmed by the UK Labour Force survey data, which show that the number of EU-2 citizens employed in the UK in the first quarter of 2014 was only 18 % higher than the first quarter of 2013, a considerably smaller increase than the one indicated by NiNo statistics.

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[29] UK ONS, Migration Statistics Quarterly Report, May 2014, available at: http://www.ons.gov.uk/ons/dcp171778_362934.pdf.
[30] The International Passenger Survey (IPS) is a large sample survey carried out at airports, seaports and tunnel routes throughout the UK. It identifies between 4 000 and 5 000 long-term migrants each year from a sample of between 700 000 and 800 000 passengers.
[31] A NINo is generally required by any overseas national looking to work or claim benefits / tax credits in the UK, including the self-employed or students working part time. The statistics provide a measure of in-migration (inflow) for adult foreigners.
[32] UK DWP Statistical Bulletin, 22 May 2014, available at: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/313401/nino-analytical-report-may-2014.pdf.

Table 12: National Insurance Number registrations for adult foreign nationals entering the UK (in thousands), top EU countries of origin for 2012/13 and 2013/14 (and % change to 2012/13) — year ending March 2014

Countries	2013 – 14	2012 – 13	Change to previous year	
			in thousands	in %
European Union	439.5	385.4	54.0	14 %
Among which: EU-2	64.6	28.2	36.4	129 %
Non EU	162.5	176.2	-13.8	-8 %
Poland	101.9	91.4	10.6	12 %
Romania	46.9	17.8	29.1	163 %
Spain	45.6	45.5	0.1	0 %
Italy	42.0	32.8	9.2	28 %
Portugal	27.3	24.6	2.7	11 %
Hungary	23.6	24.7	-1.1	-4 %
Lithuania	22.4	27.3	-4.9	-18 %
France	22.3	21.2	1.1	5 %
Bulgaria	17.8	10.4	7.4	71 %
Ireland	16.4	15.5	0.8	5 %
Slovakia	11.8	11.5	0.3	3 %
Latvia	11.3	13.6	-2.3	-17 %
Germany	10.5	11.0	-0.4	-4 %
Greece	9.0	8.7	0.4	4 %

Source: UK DWP Statistical Bulletin, May 2014 (data extracted from National Insurance Recording and Pay as you Earn System (NPS)). 2012-13 refer to the last three quarters of 2012 and the 1st quarter 2013 while 2013-14 refer to the last three quarters of 2013 and the 1st quarter 2014.

3. Emigration to non-EU countries

There are reports of increasing numbers of EU citizens emigrating to non-EU countries, particularly since the onset of the crisis. This section summarises the main findings of the Eurostat migration statistics and then analyses national (immigration) data for a selection of non-EU countries receiving EU citizens.

Eurostat emigration statistics indicate an increase in migration to non-EU countries

According to Eurostat migration statistics, movements out of EU Member States[33] to non-EU countries have intensified over the last few years. While outflows increased only slightly between 2009 and 2010 (from 1.15 to 1.17 million or +1.6 %), the increases were greater in 2011 (+85 000 or +7.3 %, to reach 1.25 million) and in 2012 (+44 000 or +3.5 %), reaching almost 1.3 million. This remains below the level of immigration to the EU from non-EU countries (1.69 million in 2012),[34] meaning that net migration in the EU remains positive overall.

In 2012, the largest countries in terms of emigration to non-EU countries were Spain (271 000 or 21 % of the total), the UK (207 000 or 16 %) and France (193 000 or 15 %), followed by Germany (126 000 or 10 %), Poland (86 000 or 7 %), Greece (62 000 or 5 %), Italy (52 000 or 4 %), the Netherlands (51 000 or 4 %) and Ireland (41 000 or 3 %). This means, unsurprisingly, that the bulk of emigration to non-EU countries stems from the largest countries in terms of population. However, as indicated in the analysis of Eurostat emigration statistics above, the distribution is also influenced by other factors such as the return of migrants to their (non-EU) origin countries.

The largest increases over 2010-2012 were recorded in: Spain (+31 400 or +13 %), Poland (+22 900 or +36 %), Italy (+13 800 or +37 %) and France (+12 600 or +7 %), followed by smaller countries that registered relatively strong increases: Cyprus (+9 400 or +286 %),

[33] Eurostat, Emigration by sex, age group and country of next usual residence (migr_emi3nxt). Note that the EU figures refer to the EU-27 aggregate (EU-28 aggregate not yet available as of May 2014).
[34] Eurostat, Immigration by sex, age group and country of previous residence (migr_imm5prv).

Portugal (+8 600 or +96 %) and Ireland (+7 300 or +21 %). Increases in these seven Member States accounted for more than 80 % of the net increase over 2010-12 at EU level.[35]

As shown in Table 6, emigration to non-EU countries in 2012 was predominant (more than 60 %) in overall emigration for countries such as the Czech Republic, Cyprus, Croatia, France, the UK and Spain. Meanwhile, in the same year, the emigration rate to non-EU countries, as a percentage of the total population, was substantially higher than the EU average (0.26 %) in Cyprus (1.5 %), Ireland (0.9 %), Spain (0.6 %), Greece (0.6 %), Denmark (0.4 %) and Slovenia (0.4 %).[36]

Finally, the 10 most popular non-EU countries in terms of emigration from the EU in 2012 were: Australia, the USA, China, Morocco, Ecuador, India, Brazil, Canada, Bolivia and Switzerland.[37] The heterogeneous pattern of this list of countries clearly shows that, as pointed out in the previous section, only part of the flows to non-EU countries reflects nationals leaving their own country (such as in Portugal and many central and eastern Member States) whereas in other countries (e.g. Spain) most emigrants to non-EU countries are returning migrants.

Emigration of EU citizens to non-EU countries: using immigration statistics of destination countries: USA, Australia and Brazil

Since immigration statistics of receiving countries are deemed more reliable than emigration statistics from origin countries, and in order to focus on work-related migration of EU citizens, the next section focuses on specific national data for three destination countries: the USA, Australia and Brazil. It also allows attention to be focused on emigration of EU nationals only — by excluding the phenomenon of return migration.

The case of the USA

In the United States of America, the number of temporary workers coming from EU Member States has increased slightly over 2008-13 for intra-company transferees (+5 %) and cultural exchange workers (+3%), while it has decreased in the case of employer-sponsor visas (-7 %). There has been a reverse trend in the number of visas issued to citizens of non-EU countries resulting in an increase in the proportion of EU citizens in total inflows to the US for intra-company transferees (from 21.5 % to 28.5 %) and for cultural exchange workers (from 32.3 to 38.5 %) and a decrease in employer-sponsor visas (from 9.6 to 7.5 %). There have however been wide differences among the main EU (origin) countries in changes in inflows since 2008. In particular, there have been large increases in numbers from Ireland and the southern EU countries while figures for the other EU-15 countries (as well as for EU-13 countries) have stagnated or decreased. For the three types of visas analysed, the rise in inflows has been highest in absolute terms from three countries: Spain, Italy and Ireland. While the figures have increased for southern EU countries, they remain limited compared to the overall number of visas granted to all EU nationals — and also compared to the active population of the sending country. As a percentage of the national labour force, the only ‘substantial’ flows (for the three categories of labour migration considered) are from Ireland — with annual inflows representing around 0.6 % of the origin country’s labour force, and ten times higher than the average for the EU (0.06 %).

[35] Note that BG, HR and NL are not covered by this analysis due to a lack of data for the reference year 2010.
[36] Eurostat, Emigration by sex, age group and country of next usual residence (migr_emi3nxt) and Population on 1 January by age and sex (demo_pjan).
[37] This ranking can be biased as it is calculated on the basis of data by individual next country of residence which is available for only 15 of the 28 Member States — and, in particular, not available for large countries of emigration to non-EU countries such as France, Germany, Poland and Greece.

Table 13: Number of temporary visas issued by the USA, by type of visa and selected countries of citizenship (2008-2013)

Country of citizenship	H-1B (employer-sponsor visa)			J-1 (cultural exchange workers*)			L-1 (intra-company transferees)		
	2008	2013	Change (in %)	2008	2013	Change (in %)	2008	2013	Change (in %)
UK	3,082	2,699	-12	17,568	19,023	8	6,276	6,254	0
France	1,770	1,782	1	12,343	13,021	5	2,529	2,378	-6
Germany	1,674	1,274	-24	25,149	22,457	-11	2,955	2,206	-25
Ireland	477	694	45	9,210	11,175	21	700	1,140	63
South EU-MS	2,113	2,533	20	11,276	15,056	34	1,760	2,946	67
among which :									
Italy	*865*	*1,086*	26	*4,905*	*6,446*	31	*799*	*1,151*	44
Spain	*775*	*888*	15	*4,926*	*7,215*	46	*749*	*1,434*	91
Greece	*324*	*374*	15	*720*	*732*	2	*49*	*110*	124
Portugal	*149*	*185*	24	*725*	*663*	-9	*163*	*251*	54
Other EU-15 MS	1,237	1,079	-13	12,237	13,238	8	2,969	2,807	-5
EU-13 MS	2,122	1,495	-30	28,407	26,265	-8	868	1,308	51
among which :									
Romania	*500*	*327*	-35	*4,003*	*4,122*	3	*195*	*167*	-14
Poland	*417*	*308*	-26	*6,297*	*4,384*	-30	*224*	*397*	77
Bulgaria	*411*	*265*	-36	*7,322*	*6,985*	-5	*40*	*57*	43
All EU MS	**12,475**	**11,556**	**-7**	**116,190**	**120,235**	**3**	**18,057**	**19,039**	**5**
Rest of the world	116,989	141,667	21	243,257	192,287	-21	66,021	47,661	-28
All countries	129,464	153,223	18	359,447	312,522	-13	84,078	66,700	-21

Source: US State Department. Notes: *J1-cultural exchange is a mixed category of students and (mostly) workers coming temporarily for 'cultural exchanges' that span all skill levels (from summer jobs to university research positions).

The case of Australia

After a strong increase in economic migration from the EU in 2011-12, the trend has reversed somewhat with a year-on-year decline in the inflow of EU workers to Australia in 2012-13 (-9 % for both categories presented in Table 14). The figures, however, remain much above the low levels recorded during the economic recession (2009-10), especially as far as temporary workers are concerned.

In 2012-13, most EU economic migrants to Australia originated from two English-speaking EU countries, namely the UK and Ireland. While the figures for the UK have dropped somewhat (permanent skilled migrants) or stagnated (permanent stream) since 2007-08, economic migration from Ireland has multiplied more than three-fold, with an inflow of temporary residents exceeding 10 000 in 2012-13, compared to 2 800 in 2007-08. Southern EU Member States also recorded a strong increase, in relative terms, for permanent (+109 %) as well as for temporary (+117 %) economic migrants — but both the absolute levels (814 and 3 250 individuals respectively) and the proportion of total flows from the EU (4.2 % and 6.9 % respectively) remain limited. As underlined in last year's analysis, there has also been an increase in permanent economic migration from France and from EU-12 countries for both categories.

Table 14: Permanent and temporary economic EU migrants to Australia, by country of citizenship (based on the number of visas granted)

Country of citizenship	Permanent migrants ('skill stream' aged 15-64)				Skilled temporary residents (subclass 457)			
	2007/08	2012/13	Change	in %	2007/08	2012/13	Change	in %
UK	15,786	11,710	-4,076	-26	23,780	24,150	370	2
Ireland	1,063	3,596	2,533	238	2,770	10,290	7,520	271
Germany	806	877	71	9	2,930	2,030	-900	-31
France	349	715	366	105	2,200	2,420	220	10
South EU-MS	390	814	424	109	1,500	3,250	1,750	117
among which :								
Italy	*229*	*462*	233	102	*860*	*1,710*	850	99
Spain	*54*	*161*	107	198	*360*	*940*	580	161
Portugal	*87*	*122*	35	40	*220*	*310*	90	41
Greece	*20*	*69*	49	245	*60*	*290*	230	383
Other EU-15 MS	868	755	-113	-13	3,120	3,345	225	7
EU-12 MS	783	955	172	22	1,180	1,585	405	34
All EU MS	**20,045**	**19,422**	-623	-3	**37,480**	**47,070**	9,590	26

Source: Australian Department of Immigration and Citizenship. Notes: Statistics on permanent migrants are based on the outcomes of the Australian Migration Programme ('skill' stream, as opposed to 'family' stream) for working-age (15-64) individuals. The periods mentioned refer to 'financial years' (e.g., 2008-2009 covers 1 July 2008 to 30 June 2009).

The case of Brazil

Brazil is one of the fastest-growing major economies in the world and is reported to have attracted an increasing number of foreign workers from developed economies, in particular those countries in the EU affected by the crisis. The number of work permits granted to EU nationals (top 13 EU countries) saw a rapid increase (from 16 900 to 22 700 or +35 %) between 2010 and 2013, in particular compared to non-EU countries for which the number of work permits hardly changed38. EU countries' share of the number of work permits rose from 30 to 36 % over 2010-13, a 6 pp increase that was entirely due to the rise in the share by southern EU citizens (from 8 to 14 %).The increase recorded for EU nationals has been particularly strong from Portugal (+285 %) and Spain (+88 %) and to some extent from France (+42 %), Croatia (+34 %), Italy (+34 %) and Greece (+29 %). By contrast, work permits have not increased much over 2010-13 for those originating in the UK (+7 %), Germany (+1 %) and Sweden (+3 %), reflecting a decline over the past year (2012-13). Overall, absolute numbers remain modest in proportion to the size of the EU countries' labour force.

[38] Due to limited data available, the figures refer to both temporary and permanent work permits. Most of the permits are temporary (95 % in total in 2013) though the distribution varies across countries of citizenship (e.g. permanent permits made up almost 16 % of permits granted to Portuguese workers).

Table 15: Temporary and permanent work permits granted in Brazil to EU citizens (2010-2013)

					Change 2010-13	
Country of citizenship	2010	2011	2012	2013	in absolute	in %
United Kingdom	3828	2500	4363	4089	261	7
Portugal	757	1547	2171	2913	2156	285
Germany	2873	3162	3589	2900	27	1
Italy	2006	2421	2999	2688	682	34
Spain	1425	1844	1992	2677	1252	88
France	1597	2166	2369	2265	668	42
The Netherlands	1137	1222	1337	1336	199	18
Poland	884	1044	942	989	105	12
Romania	628	750	698	744	116	18
Greece	463	410	556	598	135	29
Croatia	408	581	625	545	137	34
Belgium	399	534	642	512	113	28
Sweden	446	469	533	460	14	3
Top EU countries	**16851**	**18650**	**22816**	**22716**	**5865**	**35**
Top non-EU countries	31779	40078	36916	32921	1142	4
Others (EU and non-EU)	6841	10349	7488	6750	-91	-1
Total	55471	69077	67220	62387	6916	12

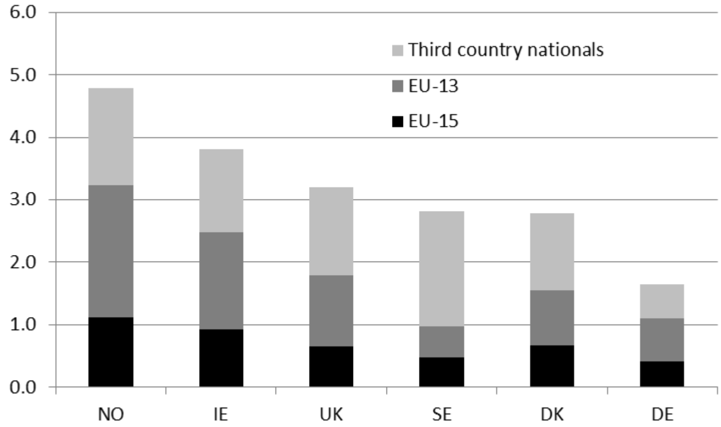
Source: Brazilian Ministry of Labour and Employment.

Box 3: Labour migration to Norway

Norway is a part of the integrated European labour market through the European Economic Area (EEA). The influx of labour migrants to Norway in recent years has been substantial, and has been fuelled by good work possibilities and relatively high wages, especially for less skilled workers. Net migration was somewhat lower in 2013 (+40 100 or -15.3 % compared to 2012) than the previous three years, but remains at a high level.

According to EU-LFS estimates, in 2013 recent economic migrants represented almost 5 % of the labour force in Norway (see Chart 13), well above the levels recorded in Sweden and Denmark (both around 3 %), as well as Ireland and the UK (3.8 and 3.2 % respectively). A substantial number of them originated in the EU-13 countries.

Chart 13: Higher relative labour migration to Norway than to other destination countries: Economically active recent migrants (<5 years) as a % of the total labour force, by group of origin countries (2013)



Source: DG EMPL calculations based on Eurostat EU-LFS.
Click here to download chart.

In 2014 (1 January value), EU-28 nationals residing in Norway numbered around 304 000 or 6.0 % of the population, compared to 3.5 % for non-EU nationals and 90.5 % for Norwegian nationals. The largest groups of foreigners residing in Norway come from Poland (85 600 or 18 %), Sweden (44 200 or 9 %) and Lithuania (35 800 or 7 %). The majority of them are in the 20-39 age group. Over 60 % of foreign citizens in Norway are EU nationals.

Table 17: Increasing migration to Norway: Changes in absolute and relative terms in the number of EU citizens in Norway (selected nationalities)

Citizenship	Changes 2004-2009		Changes 2009-2014	
	in abs. nos	in %	in abs. nos	in %
Latvia	1200	225 %	7701	444 %
Lithuania	6686	750 %	28192	372 %
Portugal	421	68 %	2119	203 %
Spain	556	44 %	3992	219 %
Greece	165	46 %	1152	219 %
Poland	36427	1329 %	46423	119 %
Italy	627	52 %	1932	106 %

Source: Statistics Norway. Note: All numbers by 1 January. All changes are positive.

Citizens from southern European countries have migrated to Norway in increasing numbers since 2008/2009, but from very low levels in absolute terms (see Table 17). These increased numbers are still much below the levels recorded from eastern European Member States.[39]

Impact of labour migration to Norway from EU Member States

The economic boom between 2003 and 2008 in Norway increased the demand for labour in the construction industry and areas of industrial manufacturing such as shipyards and food processing. This led to the recruitment and employment of the majority of the new migrant workers. Within the construction industry, the proportion of immigrant workers increased from 8 % in 2000 to 20 % in 2011.[40] Polish workers have to a large extent been recruited to work in construction, manufacturing, low-skilled services and agriculture. They constitute a significant part of the workforce in parts of these sectors, and have had a profound impact on these labour markets.[41]

In 2012,[42] 99 % of net employment growth was from immigrants (only 1 % from Norwegian nationals), of which 50 % was from eastern European EU Member States. EU citizens had (in 2013Q4) a high employment rate (83.4 %) among the working-age population (15-64 years) compared to Norwegian nationals (75.3 %), and this was even more marked compared to third country nationals (60.2 %) in Norway.[43]

In the short-term, there are indications that labour migration has had a positive effect on the Norwegian economy and public finances, partly because the age composition is younger and thus more 'favourable' than in the total population.[44] Thus far, labour migrants from the EU have contributed more through taxes and received less public benefits than the rest of the population. In this respect, labour migration has been favourable for the Norwegian economy, by contributing to employment growth, higher economic growth, less pressure problems in the labour market, and thereby strengthened public finances. However, labour migration can have displacement effects in those areas of the labour market with comparable groups of Norwegian workers. For instance, these effects are reported to occur among labour migrants and Norwegian workers without higher education in the construction industry.[45]

The long-term impact of labour migration is more uncertain. Population growth means that many people need to be included in working life within a short period of time. This can put working conditions and wages under pressure: analysis suggests that labour migration to Norway had some downward impacts on wage and price inflation.[46] In addition, high labour migration can create difficulties in getting vulnerable groups of people, such as the least employable low skilled, into work.

Questions arise as to how many of the labour migrants will stay on in Norway even if the demand for labour is reduced, and what impact high labour migration will have on rights to and transition to social security benefits,[47] in the context of a Norwegian social model based on a

[39] See also Statistics Norway (2014), 'Changes in migration patterns during the economic crisis — impact on the migration flows to Norway'. This paper was prepared for the United Nations Economic and Social Council's conference of European Statisticians in April 2014. The paper analyses the impact of the economic crisis on the migration flows to Norway in general, with a special focus on labour migration.
http://www.unece.org/fileadmin/DAM/stats/documents/ece/ces/2014/ECE_CES_2014_43-Norway_Migration_patterns_during_the_crisis.pdf.
[40] Bratsberg, B. and O. Raaum (2013), 'Migrasjonsstrømmenes påvirkning på lønns- og arbeidsvilkår' [Migration Flow Impact on Wages and Working Conditions], Samfunnsøkonomen 3/2013. Oslo: Norway.
[41] Friberg, J. H. (2013), The Polish worker in Norway. Emerging patterns of migration, employment and incorporation after EU's eastern enlargement. Fafo-report 2013:06. Oslo: Norway.
[42] From 2011Q4 to 2012Q4.
[43] Eurostat, EU Labour Force Survey.
[44] NOU 2011:7 Velferd og migrasjon — Den norske modellens framtid [Summary in English: 'Welfare and migration: Perspective and summary'], Norwegian Official Report No 2011:7.
[45] Bratsberg, B. and O. Raaum (2013), 'Migrasjonsstrømmenes påvirkning på lønns- og arbeidsvilkår' [Migration Flow Impact on Wages and Working Conditions], Samfunnsøkonomen 3/2013. Oslo: Norway.
[46] Idem.
[47] Studies of the first labour migrants that came to Norway from Pakistan, Turkey, India and Morocco during the early 1970s show long-term effects of reduced employment and increased transfer of social security benefits compared to native comparison persons. (Bratsberg, B., O. Raaum, and K. Røed (2006), The Rise and Fall of Immigrant Employment: A Lifecycle Study of Labor Migrants to Norway, The Ragnar Frisch Centre for Economic Research, Oslo: Norway. http://www.frisch.uio.no/publikasjoner/pdf/riseandfall.pdf.) Other questions revolve around the immigrants' level of export of social benefits, and how this will develop in the future.

universal and comparatively generous welfare state. The long-term benefits of labour migration are dependent on labour migrants' chances of remaining in employment.

Conclusions

On the basis of the recent data presented on the geographical mobility of workers in the EU, one can draw the following conclusions:

In 2013, **a just over 10 million EU citizens of working-age were living in another EU country than their own**. On average they have higher activity and employment rates than the 'nationals' (those living in the country of their citizenship). Nevertheless, the labour market situation of mobile EU citizens differs across both the origin country and the country of residence. Mobile citizens from the central and eastern countries tend to have lower quality jobs being more likely to work part-time or with temporary contracts, to be over-qualified for their job and at greater risk of redundancy. Analysis of EU-SILC data confirms that there is no over-use of social security benefits by mobile EU citizens.

The share of people considering working in another Member State in the future has been relatively stable over 2011-13, but increased in the countries characterised by an adverse economic situation. However, the drivers of mobility seem to differ; citizens from southern countries are more likely to indicate the 'inability to find a job in their country' as the primary motivation while those from the central and eastern countries, are more prone to mention that the main reason to be mobile is to 'get a better salary'.

Comparing with the pre-crisis (2008) period indicates that **emigration and immigration flows in EU Member states have been changing quickly**, with a strong correlation with the labour market situation : in countries such as Portugal, Spain, Ireland and Italy as well as Slovenia, immigration flows decreased and emigration increased – while the inverse has been true in Germany. However, as a % of the population of 'nationals', the emigration rate in 2012 was low (despite recent increases) in Italy, Spain or Hungary, in particular compared to Romania, Greece, Ireland as well and Latvia and Lithuania. Another finding based on Eurostat migration statistics is the high level of return mobility to central and eastern Member States, where most of the 'immigrants' are in fact nationals returning from abroad.

Focusing on labour mobility through EU-Labour Force Survey data indicates a **rebound in mobility flows (+21%) in the more recent years (2012-13)** compared to the previous period (2010-11), while the number of newcomers from third-countries went on falling (-16%). Trends in intra-EU mobility differ markedly across destination countries (increases in Nordic countries, Germany and Austria *against* decreases in France, Spain and Italy) as well across the origin countries, with the strongest rise recorded from southern Member States, and, to a lesser extent, from the EU-10 countries (countries that joined the EU in 2004). Recent migration and social security data for Germany (and the UK) confirm these trends. However, overall the increase in the number of southern citizens working in Germany remains limited in % of the unemployed population in those origin countries, confirming the rather limited role of adjustment through mobility between euro area countries.

Comparing the intra-EU mobility flows over 2009-13 to the pre-crisis period (2004-08) several important lessons can be drawn:

- Overall, flows increased from the Baltic countries (+19%) and even more from southern countries (+39%). As a result southern movers made up 18% of the flows in 2009-13 compared to 11% before. This contrasts with substantial declines in the flows from Poland (-41%) and Romania (-33%). In 2009-2013 a substantial share (59%) of intra-EU movers originated in EU-13 countries (those which joined the EU since 2004), though it is down from 66% before.
- Large shifts occurred in terms of destination countries with Germany, Austria, Belgium and Nordic countries taking a larger share of intra-EU movers than before – while the

shares of Ireland and Spain dropped substantially. Overall, flows from EU-2 countries have diminished but their distribution across destination countries has largely changed.

- In terms of age composition, intra-EU movers remain predominantly young, but the share of those aged 15-29 declined (from 48% to 41%), reflecting the difficulties faced by young people to take advantage of the right to free movement in the EU, in the current context of high youth unemployment.
- Finally, **recent intra-EU movers are more often highly educated**, with a share of tertiary graduates increasing from 27% in 2004-08 to 41% in 2009-13, reflecting the changing labour demand across skills level since the recession. This increase in the level of education translated chiefly into higher-skilled occupations and the over-qualification rate increased only for mobile citizens from southern Member States, though it remains at very high level as far as workers from central and eastern Member States are concerned.

Administrative data for the UK and Germany point to **increases in the number of Romanian and Bulgarians workers during the 1st quarter 2014**, i.e.: since the end of the transitional arrangements period. However, in the UK those figures reflect to a great extent mobility flows that **occurred before the 1st January**.

As for **emigration to outside the EU**, the movements have amplified over the last few years, from 1.17 million in 2010 to 1.3 million in 2012. The bulk of emigration to non-EU countries stems from the largest countries (in terms of population) but is also influenced by the return of migrants to their (non-EU) origin countries as only part of the flows to non-EU countries reflect nationals leaving their own countries. While most emigrants from Portugal and many central and eastern Member States are 'nationals' going abroad, those leaving Cyprus and Spain towards non-EU countries are predominantly returning migrants. Nevertheless, specific data collected for the USA, Australia and Brazil confirm the increase in labour migration of EU citizens (notably from southern EU countries), though the figures in absolute terms remain limited, except in the case or Ireland.