



Intra-EU Labour Mobility at a glance

Main findings of the 2019 Annual Report on intra-EU Labour Mobility

EUROPEAN COMMISSION

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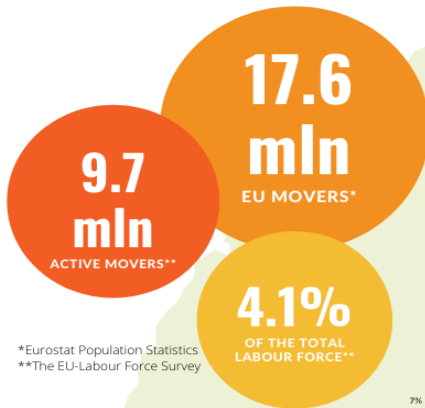
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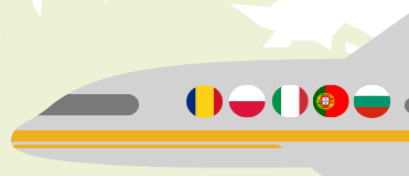
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INTRA-EU LABOUR MOBILITY

IN 2018



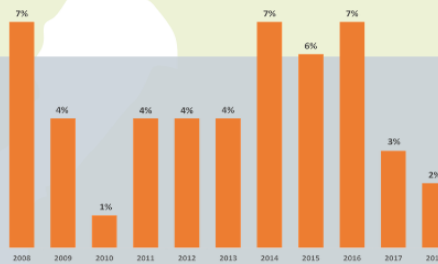
*Eurostat Population Statistics
**The EU-Labour Force Survey



Romania, Poland, Italy, Portugal and Bulgaria remained the five **most important sending countries** in 2018.

EU-28 ACTIVE MOVERS

In **2018** the smallest annual growth (2%) since **2010** has been observed.



50%
OF ALL EU MOVERS

reside in either **Germany** or the **UK** and a further quarter reside in **Spain, Italy or France**

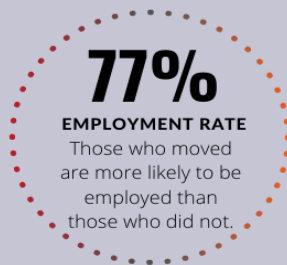
FOR EVERY 4 PERSONS WHO LEAVE, 3 OTHERS RETURN

In **2017** the share of those who returned compared to those who left increased to **72%**.



>50%

OF EU LONG-TERM MOVERS stayed in their host country only between **1 and 4** years.



The main sectors of employment for EU movers **manufacturing, wholesale and retail trade, construction and accommodation and food services**, with significant gains in the **IT sector** in the last years (+14%).



Context

The Commission publishes each year a **Report on the intra-EU labour mobility which provides updated information on labour mobility trends in EU and EFTA countries¹**.

The analysis covers the mobility of all working age citizens (20-64 years) as well as the **mobility of those who are active** (employed and unemployed). The report also looks at indicators of economic integration of mobile citizens, such as employment /unemployment rates and occupations.

The **two main data sources** used are **Eurostat population and migration statistics** – for mobility of all citizens – and the **European Labour Force Survey (EU-LFS)** for the analysis of mobility of active citizens and economic integration.

The current paper **highlights the most relevant figures of labour mobility** from the 2019 **Report on the intra-EU labour mobility, covering both EU citizens and EU workers**. It also contains **new findings** on “**mobility spells**” (period of stay in the destination country).

Intra-EU mobility still growing but at a slower pace

The latest developments confirm that **intra-EU mobility continued to grow, but at a slower pace than in the previous years**.

Composition of intra-EU mobility, EU-28 citizens in the EU-28, 2018

Type of mobility	2018	2017	Annual change
'Long-term' EU-28 movers (all ages) living in EU-28 (Eurostat demography figures)	17.6 million	17 million	+3.6%
'Long-term' EU-28 movers of working age (20-64 years) living in EU-28 (Eurostat demography figures)	12.9 million	12.4 million	+3.4%
<i>(as share of the total working-age population in the EU-28)</i>	4.2%	4.1%	
EU-28 movers of working age living in EU-28 (EU-LFS figures)	11.7 million	11.5 million	+1.1%
...of which active EU-28 movers (employed or looking for work)	9.7 million	9.5 million	+1.9%
<i>(as share of the total labour force in the EU-28)</i>	4.1%	4%	
EU-28 movers of working age who were born outside the country of residence (EU-LFS figures)	10.95 million	10.8 million	+1.4%
Cross-border workers (20-64 years) EU-LFS figures)	1.5 million	1.4 million	+2%
<i>(as share of the total employed in the EU-28)</i>	0.7%	0.7%	

¹ <https://ec.europa.eu/social/main.jsp?catId=1282&langId=en>

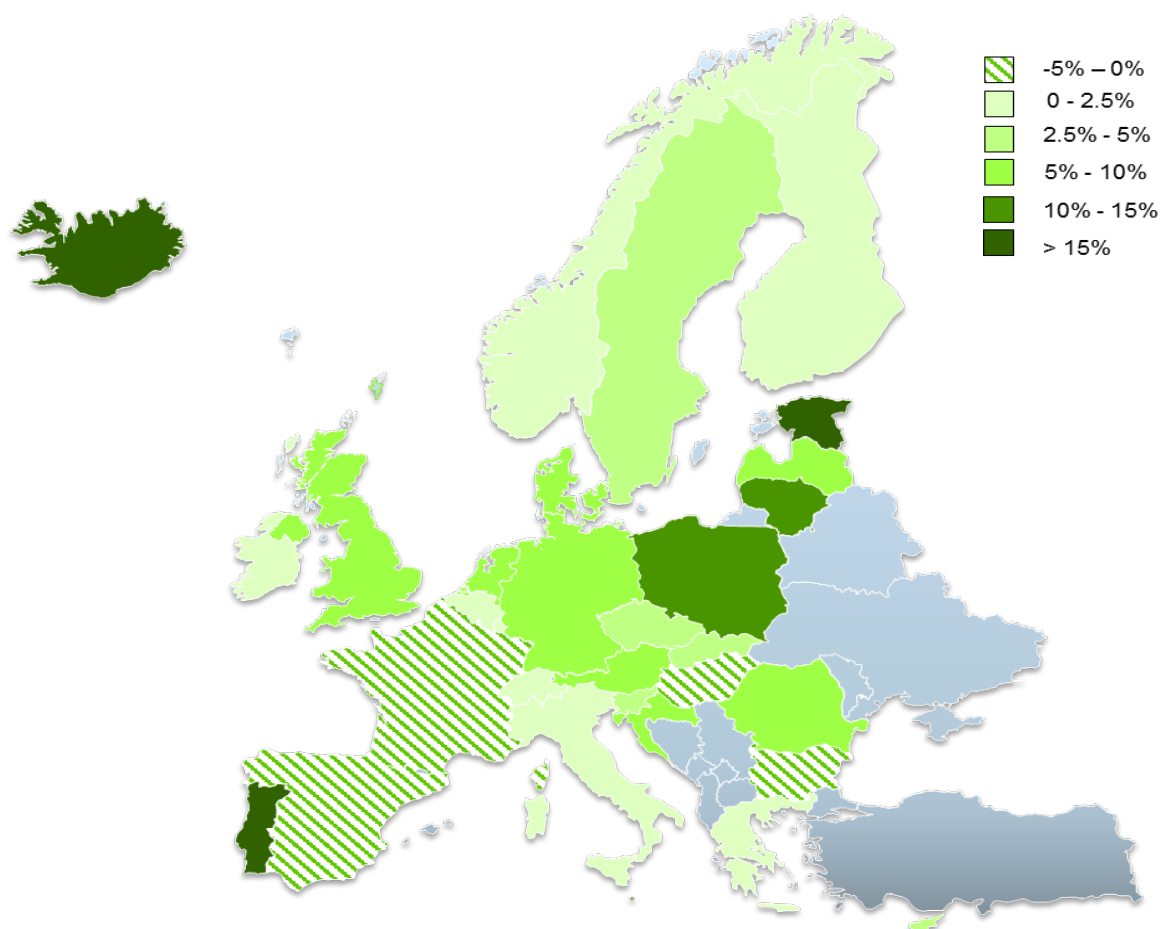
Type of mobility	2018	2017	Annual change
Number of postings (of employed and self-employed), all ages (no. of PDs A1) (source: HIVA-KU Leuven)	3 million	2.8 million	+6%
= approximative number of persons	1.9 million	1.8 million	+6%
Annual return mobility (20-64 years) (Eurostat data on mobility flows)	723,000(2017)	680,000(2016)	+6%
(as ratio to EU-28 nationals leaving their country of origin in 2017)	72%	66%	

Mobility of EU citizens up by 3.6%

In 2018, there were **17.6 million EU-28 movers in the EU**, out of which **12.9 million EU movers of working age** (20-64 years), according to Eurostat population statistics.

The stock of working age EU-28 movers increased by **3.4% compared to 2017**, being **the smallest increase in recent years** as it follows a stable increase of around 5% year-on-year since 2014.

Year-on-year change in stocks of EU-28 movers (20-64 years) from 2017 to 2018, by country of residence

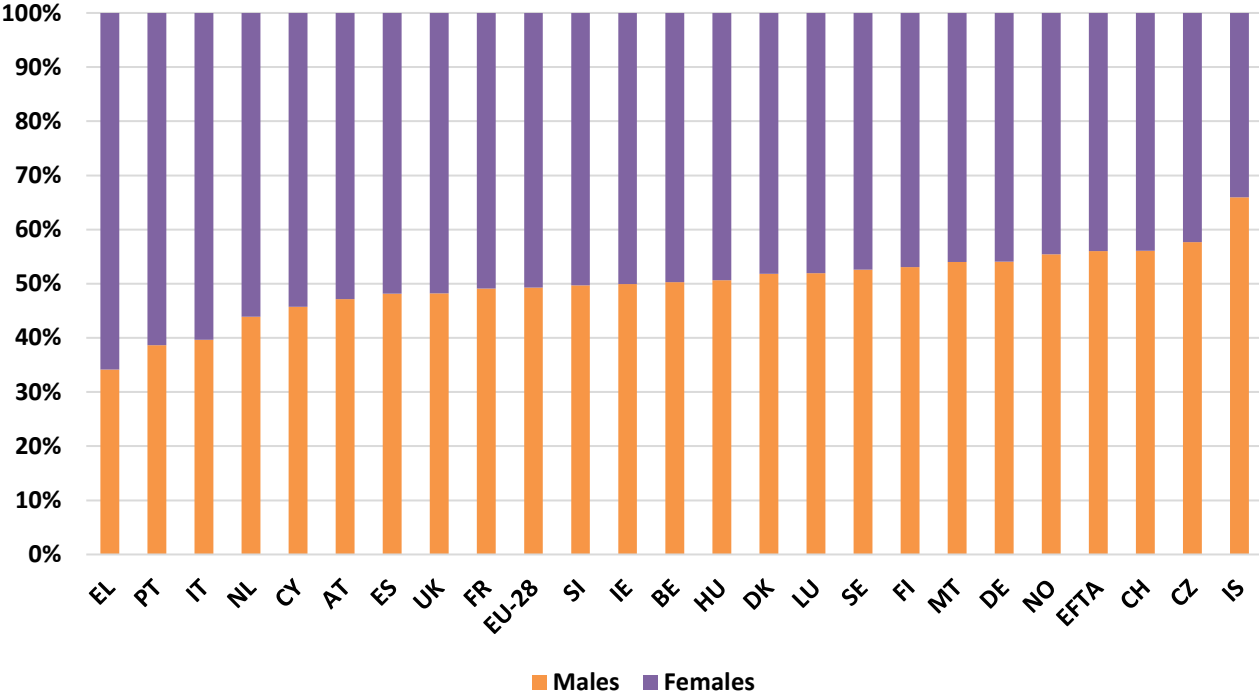


SOURCE: EUROSTAT DATA ON POPULATION BY CITIZENSHIP AND AGE GROUP, ONLINE DATA CODE: MIGR_POP1CTZ (EXTRACTED FEBRUARY 2019), MILIEU CALCULATIONS.

At EU level there is a **slightly larger share of female movers than male movers (51% to 49%)**.

In Greece, Portugal and Italy, 60% or more of EU-28 movers are female, whereas in the Czech Republic and Germany there are significantly more male movers (58% and 54%).

Gender distribution of EU-28 movers, by country of destination, 2018



SHARE OF MALE AND FEMALE MOVERS OF EU-28 MOVERS AND EU-28 AND EFTA AGGREGATES BY COUNTRY OF DESTINATION, 2018. FIGURES FOR BG, HR, LT, LV, PL, RO AND SK ARE BELOW RELIABILITY LIMITS THEREFORE EXCLUDED FROM THE GRAPH. FIGURES FOR SI AND NO HAVE LOW RELIABILITY. SOURCE: EU-LFS 2018, SPECIAL EXTRACTIONS PROVIDED BY EUROSTAT, MILIEU CALCULATIONS.

Three-quarters of EU-28 movers reside in Germany, UK, Spain, Italy and France

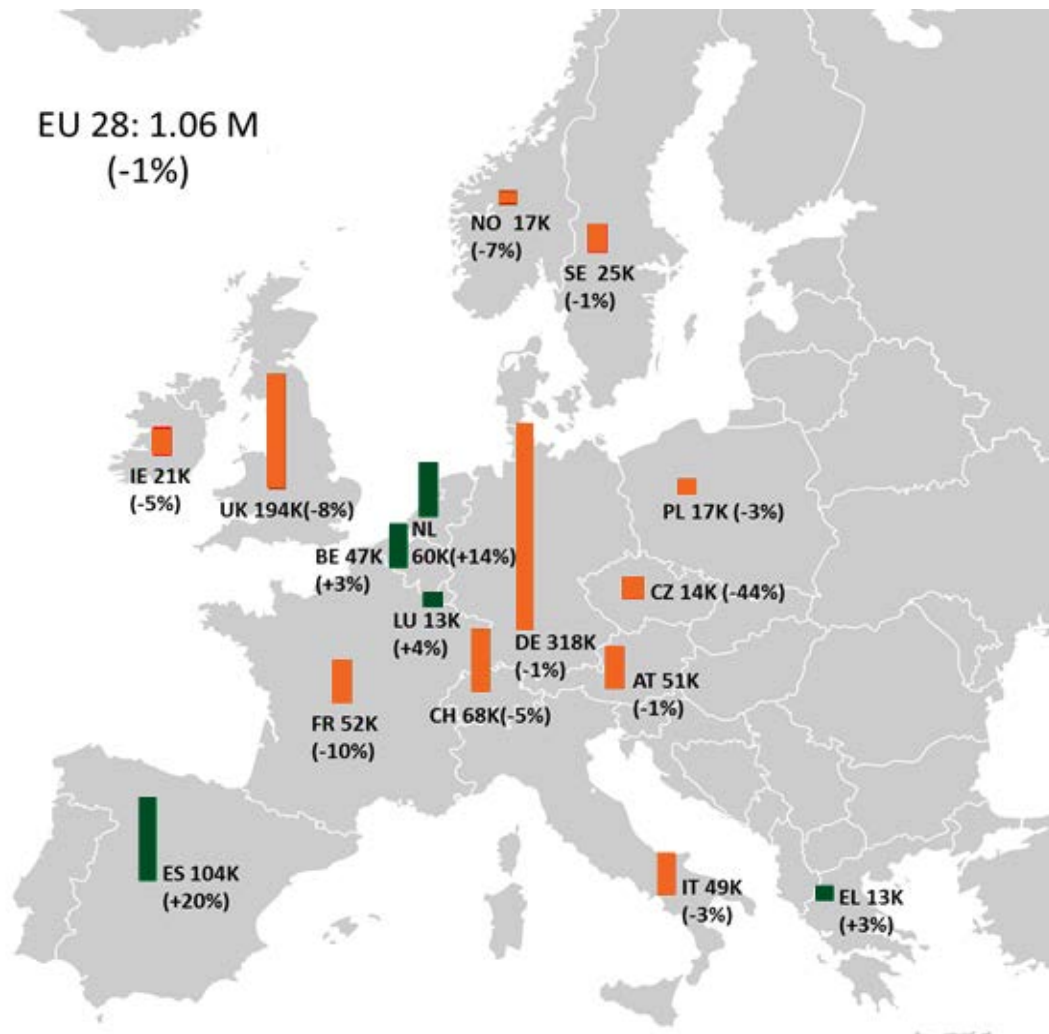
The inflow of EU-28 movers to other EU Member States stood at 1.06 million people in 2017, the same figure as in 2016.

Germany and the UK remain the principle destination countries for EU movers, with inflows of 318,000 and 194,000 people respectively in 2017.

In 2018 **three-quarters of EU-28 movers** were **residing** in five major destination countries: **Germany, UK, Spain, Italy and France**. Just under half of all EU-28 movers were residing in Germany or the UK.

EU-28 movers represent 4.2% of the whole population of the EU. The country with the largest proportion of EU-28 movers in the total population is Luxembourg (44%). Cyprus, Ireland, Malta, Austria, Belgium, Switzerland and Iceland all have a proportion of EU movers exceeding 9% of the population.

Distribution of inflows to EU-28/EFTA Member States of nationals of another EU28 country in 2017, 20-64 years, for selected EU and EFTA countries



RED BARS INDICATE A DECREASE IN THE FLOWS FROM LAST YEAR. GREEN BARS INDICATE AN INCREASE IN THE FLOWS FROM LAST YEAR. THE CHANGE IS INDICATED BETWEEN THE BRACKETS FOR EACH COUNTRY.

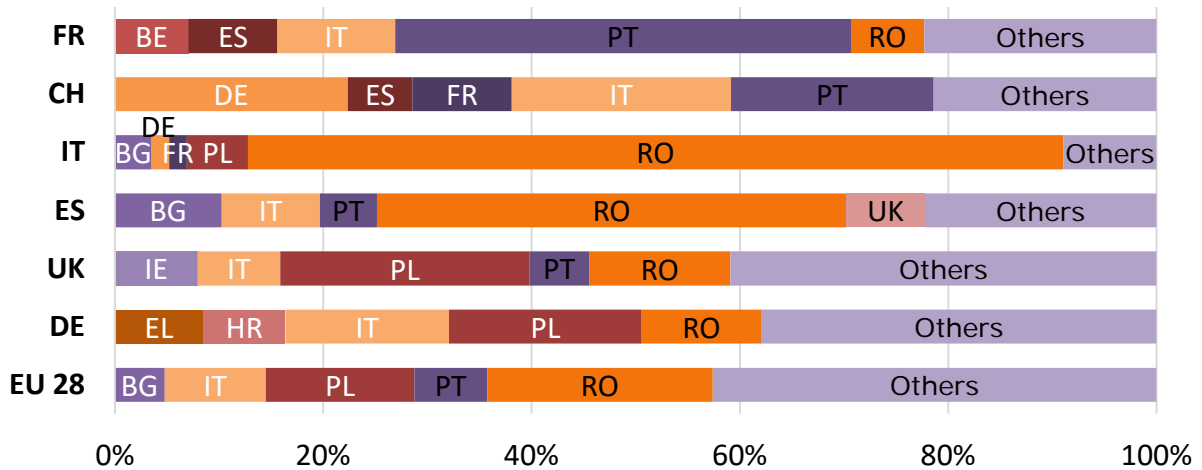
SOURCE: EUROSTAT DATA ON IMMIGRATION BY AGE GROUP, SEX AND CITIZENSHIP, ONLINE DATA CODE: MIGR_IMM1CTZ (EXTRACTED ON 14 MARCH 2019), MILIEU CALCULATIONS.

Romania, Poland, Italy, Portugal and Bulgaria still main sending countries

The countries that saw the most nationals leave for other EU countries in 2017 were Romania (173,000), Germany (163,000), Poland (127,000), UK (111,000) and Italy (86,000). Outflows for these countries were generally similar to numbers for 2016, although Germany and Poland saw a 7% and 10% decrease, respectively. In terms of longer-term trends, the rate of increase of outflows from Romania (+2%) continued to slow down from larger increases in the previous years; a similar pattern is seen in Italy.

Romania, Poland, Italy, Portugal and Bulgaria remained the five most important sending countries in 2018. Over 50% of EU movers were **Romanian, Polish, Italian or Portuguese**. Together they accounted for **6.1 million people**.

Breakdown by citizenship of EU-28/EFTA movers of working age (20-64) in EU-28/EFTA and in the top six countries of residence, 2018

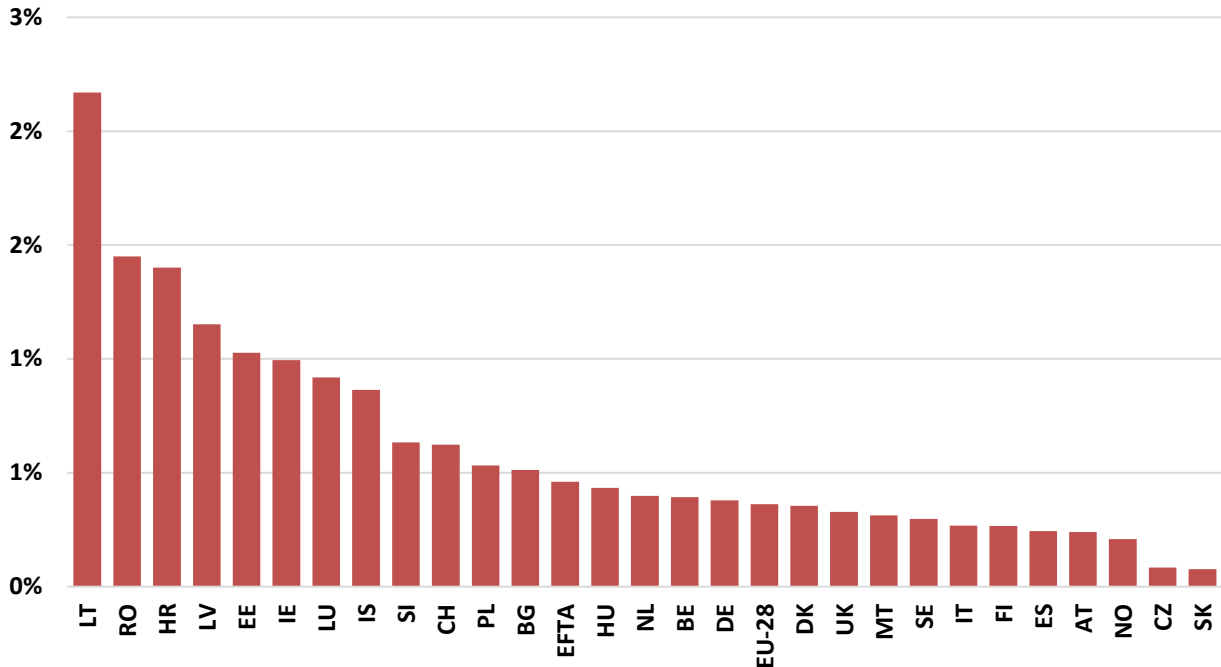


MOST REPRESENTED NATIONALITIES FOR EU-28/EFTA MOVERS IN THE SIX COUNTRIES OF RESIDENCE WITH THE HIGHEST NUMBERS OF EU-28 MOVERS, EU-28 AND EFTA, DATA REFERS TO 2018.

SOURCE: EU-LFS 2018, SPECIAL EXTRACTIONS PROVIDED BY EUROSTAT, MILIEU CALCULATIONS

The rate of outflow of nationals gives a **picture of the outflow of nationals as a proportion of the population of a country.**

Outflow rate of nationals of working age (20-64), by country of citizenship, 2017



SOURCE: EUROSTAT DATA ON EMIGRATION BY AGE GROUP, SEX AND CITIZENSHIP, ONLINE DATA CODE: MIGR_EMI1CTZ (EXTRACTED ON 13 MARCH 2019), AND DATA ON POPULATION ON 1 JANUARY BY AGE GROUP, SEX AND CITIZENSHIP, ONLINE DATA CODE: MIGR_POP1CTZ (EXTRACTED ON 12 MARCH 2019), MILIEU CALCULATIONS.

Return mobility increases: for every four persons who leave, three return

Return mobility at EU level remained at similar level to the previous year, accounting for 22% of all inflows. Return mobility was particularly high as a share of inflows to Romania (86%) and Poland (52%).

Most EU countries had negative net mobility for nationals, meaning that more nationals left the country than returned to it. The only exceptions were Denmark, Estonia, Malta and Hungary.

Return mobility (inflows of nationals), age group 20-64, 2009-2017 (in thousands)

		2009	2010	2011	2012	2013	2014	2015	2016	2017
EU -28	Total	628	607	596	643	617	641	622	680	723
	Annual Δ		-3%	-2%	8%	-4%	4%	-3%	9%	6%

SOURCE: EUROSTAT DATA ON IMMIGRATION BY AGE GROUP, SEX AND CITIZENSHIP (MIGR_IMM1CTZ) (EXTRACTED ON 14 MARCH 2019), MILIEU CALCULATIONS

Net mobility of EU-28 movers², while remaining positive, continued to decrease in 2017 (-18%).

Net mobility of nationals of EU Member States **remained negative**³, nevertheless the share of those who returned compared to those who left in 2017 increased to 72% (66% in 2016), **meaning that for every four persons who leave, three return**.

At 71%, **Romania**, the main country of origin, has **almost exactly the same proportion of leavers compared to returnees as the EU aggregate** (72%).

In Poland, Germany and the UK, return mobility is slightly less frequent (55%, 54% and 60%, respectively) – on four persons leaving, two return. Several other countries of origin saw even lower proportions of return mobility: in Croatia (17%), Italy (33%), Lithuania (24%), Latvia (33%), Slovenia (29%) and Slovakia (33%).

Increase in active EU mobile workers

The European Union **Labour Force Survey** indicates a figure of **11.7 million EU movers of working age**, out of which **active movers** 9.7 million in 2018 (up to 83%), a 2% increase from 2017.

This also indicates a continuation of declining growth: between 2014 and 2017, active movers had shown an annual growth of 6%-7%, whereas in 2017 that growth declined already to 3%.

² The difference between the number of EU-28 movers coming to and leaving a Member State

³ More nationals left their country of origin than returned

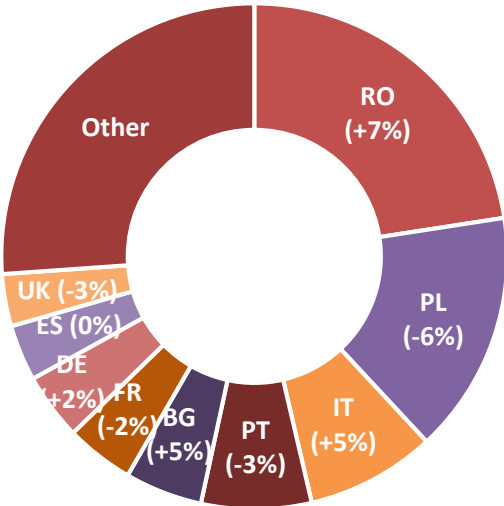
The active movers represent 4.1% of the total labour force in the EU-28 Member States.

The countries that host the most active movers are the same as those that hold the most movers, as described in the previous section: **Germany, the UK, Spain, Italy and France**. These five countries account for around 78% of active movers, whilst **Germany and the UK alone account for exactly half of all active EU-28 movers**.

There were **800,000 active new EU-28 movers in 2018** (movers who have arrived in their country of residence in the last two years). This was around **100,000 less than in 2017, an 11% decrease**.

Romania remained the EU Member State **sending the most active movers**, showing a 7% increase in the number of Romanian active movers compared to 2017. Stocks of Polish movers, the second largest group of active movers, decreased by 6%.

Most common countries of origin of EU-28 active movers, 2018 (percentage change on number for 2017 in brackets)



SOURCE: LFS 2018, SPECIFIC EXTRACTATIONS PROVIDED BY EUROSTAT, MILIEU CALCULATIONS.

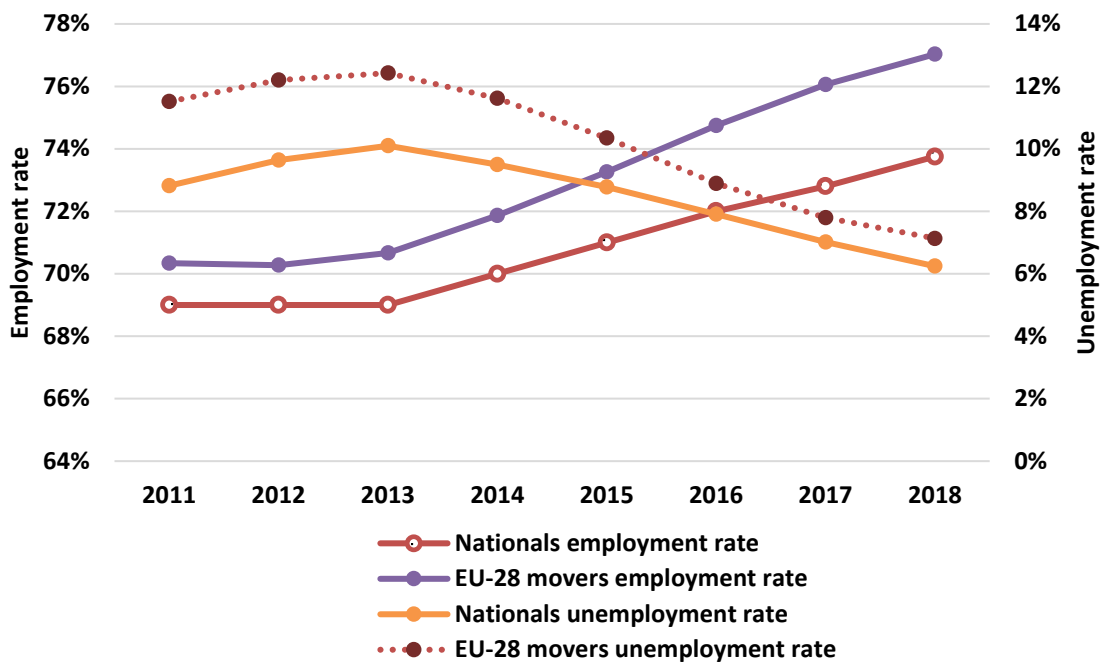
Labour market status confirms higher employment rate of EU-28 movers

EU-28 movers are more likely to be employed than nationals in the country of residence. In 2018, the employment rate of EU-movers was 77%, compared to 74% for nationals. Of the major destination countries, in the UK, Italy and Ireland the employment rate of movers was at least 4 pps higher than that of nationals.

Also, movers have a **higher employment rate than nationals that have stayed in their country of origin**. Exceptions to this include the UK (-10 pps), Germany (-5 pps) and the Netherlands (-7 pps).

EU-28 movers also had a **slightly higher unemployment rate (7%) than nationals (6%)**.

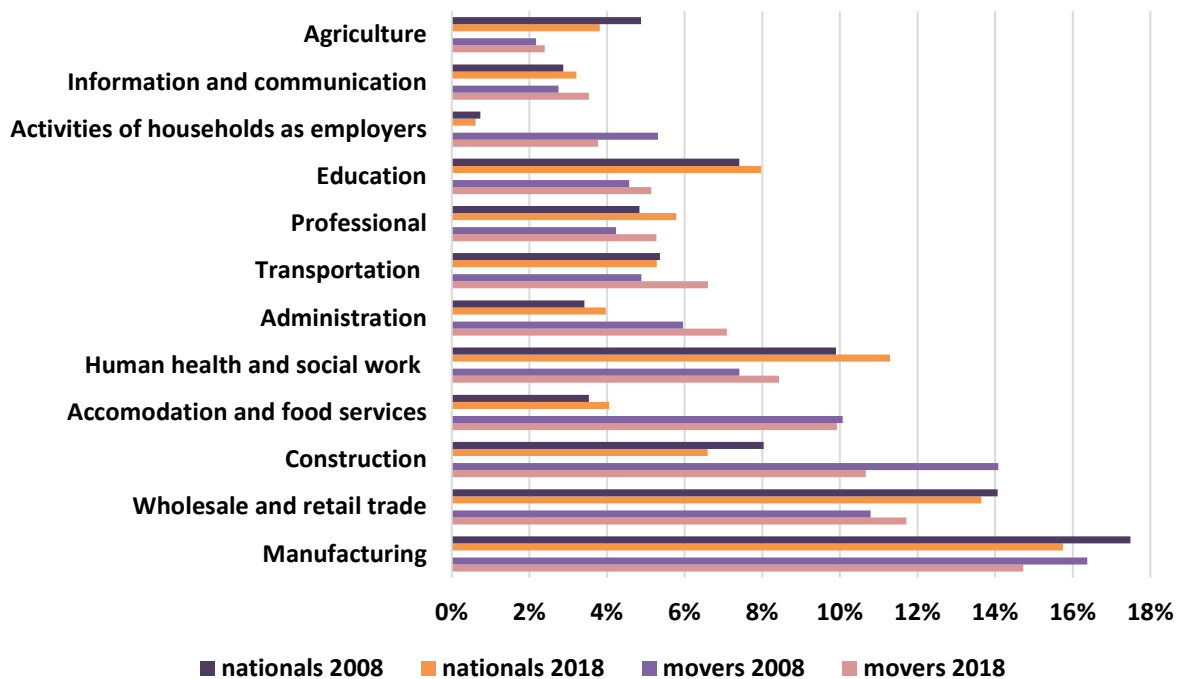
Trend in employment rate and unemployment rate for EU movers and nationals 2011-2018



SOURCE: EU-LFS 2018, SPECIFIC EXTRACTIONS PROVIDED BY EUROSTAT, MILIEU CALCULATIONS.

The main sectors of employment for EU movers in 2018 were, similar to the previous year, **manufacturing, wholesale and retail trade, construction and accommodation and food services**, and, compared to 2017, **significant gains** of employed movers could be found in the **IT sector (+ 14%)**.

Shares of working-age EU-28 movers (excl. born in country) and nationals by employment sector - 2008 and 2018



SOURCE: EU-LFS 2018, SPECIFIC EXTRACTIONS PROVIDED BY EUROSTAT, MILIEU CALCULATIONS

Across the EU, 36% of active EU-28 movers have high education levels, 40% medium and 23% lower education levels. **A fifth of EU movers is employed in low-skill or elementary occupations** that require only a lower secondary degree; **another fifth is employed in high-skill occupations**. The remaining movers are employed in occupations with medium skill level requirements.

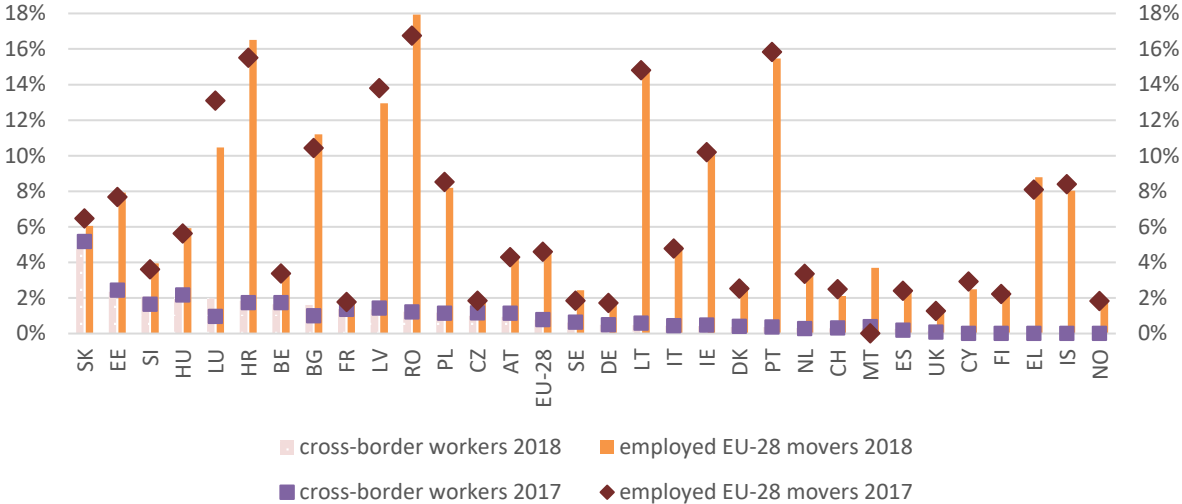
Scandinavian countries such as Sweden (64%) and Denmark (59%) have the highest shares of movers with high levels of education, followed by Luxembourg (56%) and Ireland (55%). The highest shares of movers with low levels of education were found in Finland (40%), France (39%), Italy (35%) and Portugal (33%).

The number of cross-border workers continues to increase

In 2018, **the total number of workers residing in one EU Member State and working in another one was 1.475 million**, a **4% increase on 2017** continuing the annual growth scale between 2016 and 2017.

Additionally, 376,000 workers were residing in an EU Member State and working in an EFTA country (a slight decrease compared to 2017) and 10,000 were residing in an EFTA country and working in an EU Member State. Further 10,000 were residing in an EFTA country and working in another EFTA country.

Share of employed EU-28 movers and cross-border workers from all employed nationals of country of origin, by country of origin, 2018, 20-64



SOURCE: EU-LFS 2018, MILIEU CALCULATIONS.

The **main countries of residence** of cross-border workers working either in another EU Member State or an EFTA country were: France (374,000), Germany (241,000) and Poland (206,000).

The main individual **countries of work** were by far Germany (406,000) and Switzerland (324,000). Luxembourg (182,000), Austria (166,000), the Netherlands (114,000), the UK (105,000) and Belgium (90,000) are countries of work for between 5% and 12% of cross-border workers, and the other countries provide work for smaller shares.

Compared to 2017, the greatest changes in countries of work could be seen in Belgium (+16%) and Luxembourg (+9%). Important decreases occurred in Switzerland (-19%), France (-17%) and Italy (-10%).

Mobility spells are getting shorter

Mobility of a few years (1 to 4 years) has increased strongly since 2004, both in absolute numbers as well as in shares from all movers leaving at a certain point in time; this applies to both EU-13 and EU-15 movers.

Data shows that in 2017, at least 50% of long-term movers leaving the host country had only been staying there for one to four years.

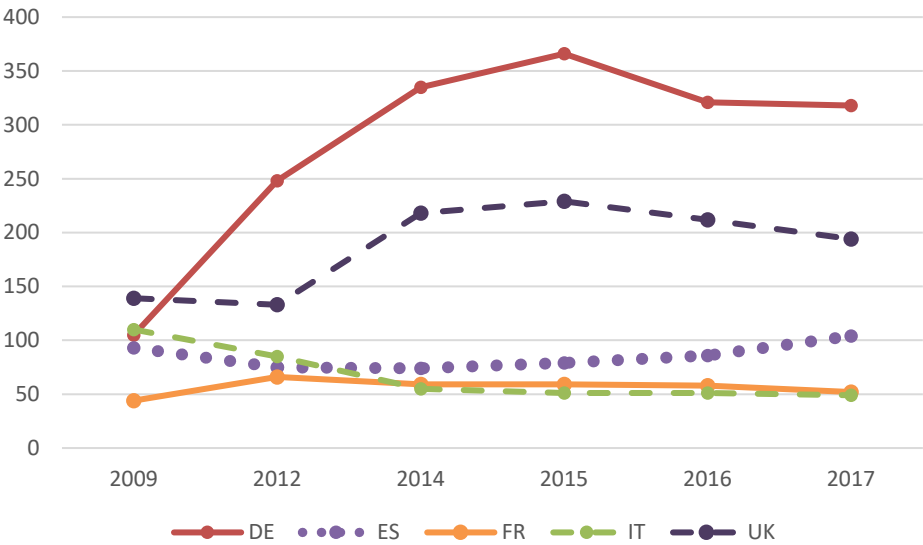
Mobility of a few years (1 to 4 years) has increased significantly since 2004.

A similar trend can be observed in short-term mobility (moving for less than 12 months): **numbers of short-term movers increased** in total and as a proportion of all movers since 2004.

EU movers are generally of young working age when they leave their country of origin. Since young movers are the most likely to undertake additional moves this is another indication of prevalence of short-term mobility.

Circular mobility is very difficult to measure and findings from the literature showed that developments highly depend on the national and country of origin context which is why no general conclusions can be drawn about an increase or decrease in this form of mobility. However, the **increase in forms of short-term mobility** suggests **an increase in circular mobility**, as movers who moved once have been found to be more likely to undertake subsequent moves.

Inflows of EU-28 movers of working age to main countries of destination, 2009-2017



SOURCE: EUROSTAT MIGRATION STATISTICS

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