Intra-EU Labour Mobility at a Glance 2022

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Directorate-General for Employment, Social Affairs and Inclusion

INTRA-EU LABOUR MOBILITY

IN 2021

81% OF MOVERS ARE ACTIVE ON THE LABOUR MARKET**

3.9% OF EU LABOUR FORCE **

10.2 mil. OF EU MOVERS BETWEEN 20-64 YEARS*

1.7 mil. OF CROSS-BORDER WORKERS**

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

As a result of the COVID-19 pandemic, compared to 2019: **Outflows** of EU movers decreased by **14%** and **inflows** decreased by **21%**.

Main countries of **destination:** More than half of movers (57%) live in **Germany**, **Spain** or **Italy.**

Main countries of **origin**: **Romanians** (27%), **Polish** (12%) and **Italian** (10%).

EU movers and nationals had an **employment rate** of **74%**.

Third country nationals had an **employment rate** of **59%**.

The education level of EU movers is increasing: In 2016, 28% of movers had **higher education**; in 2021, 32%.

55% of **cross-border workers** go to **Germany**, **Switzerland**, and **Luxembourg**.

70% of cross-border workers are **male**.

45% of cross-border workers are in **manufacturing** and **construction**.

EU movers are concentrated in a **few occupations**.

The number of EU movers working in **high-tech occupations** is similar to the distributional average.

Movers are overrepresented among:

- **9%** CLEANERS AND HELPERS
- **7%** BUILDING AND RELATED TRADES WORKERS
- **6%** SALES WORKERS
- **6%** PERSONAL SERVICE WORKERS

Introduction

The annual report on intra-EU labour mobility provides updated information on labour mobility trends in EU and EFTA countries based on 2020/2021 data. The analysis considers the mobility of all working age EU citizens (20-64 years) in particular the mobility of the EU citizens in this age group who are active in the labour market (i.e. employed and unemployed).

Each annual report also covers special topics associated with intra-EU labour mobility. The 2022 edition focuses on cross-border workers in the EU and EFTA on the one hand, and, on mobility of persons with specific occupations on the other.

The two main data sources are Eurostat population and international migration statistics and the European Labour Force Survey (EU-LFS), collected until October 2022. Where necessary, the coherence between these two sources as well as their comparability over time are discussed in the report.

The mobile working age population in 2016-2021

Overall trend. Overall, there was a significant decline of actual labour mobility during 2020, in large part due to the restrictions caused by the COVID-19 pandemic. However, stocks of movers remained stable, as both outward and return mobility declined.

Flows of working age movers. In 2020, inflows of working age movers at the EU and EFTA level declined by 21% and outflows decreased by 14%. Thus, the flows consisted in 2020 of 804 000 EU movers and 611 000 persons returning to their country of citizenship. 57% of incoming EU movers at the EU and EFTA level were male, like in 2020. This proportion was particularly high in Eastern European countries, such as Poland, Latvia, and Bulgaria. Only three Member States (Italy, Greece, and Ireland) reported more working age women than men moving into the country. Incoming movers are relatively younger than the population at large, indicating that individuals that are earlier in their career are more likely to move. The Nordic countries and the Netherlands recorded the highest shares of 20-34 years old movers, whereas Croatia and Bulgaria mostly saw older movers settling in.

Stocks of working age movers. Between 2020 and 2021, the stock of foreign EU citizens remained relatively stable with around 10.2 million working age EU citizens residing in an EU country different than their country of citizenship.[1] The composition of EU movers by citizenship has remained broadly the same since 2016, with Romanians remaining the largest individual group (27%) followed by Polish (12%) and Italian (10%).[2]

[1] Estimate based on Eurostat population statistics. According to EU-LFS data, which is differently sampled, there are just over 8 million EU movers.

[2] These estimates are based on EU-LFS data, as the required detailed is not available in Eurostat population statistics.

Table 1: Main indicators of intra-EU labour mobility in 2021

Type of mobility	1 January 2021	1 January 2020	∆ 2020/2021
1. Long-term EU and EFTA movers in the EU according to Eurostat population statistics[3]			
All ages *	13.9 million	13.6 million	(+2.5%)
Working age (20-64 years) *	10.2 million	10.2 million	(+0.02%)
Working age movers as a share of the total working age population[4]	3.9%	3.8%	(+0.1 pps)
	2021	**2020**	**∆ 2020/2021**
2. Long-term EU and EFTA movers in the EU according to the EU-LFS			
Working age (20-64 years) **	8.0 million	8.0 million	(±0.0%)
… of which **active movers** (employed or looking for work)**	6.5 million	6.4 million	(+2.6%)
Active movers as a share of the total labour force[5]	3.1%	3.1%	(+0.0 pps)
3. Cross-border workers[6] (20-64 years)	1.7 million	1.7 million	(-1.5%)
As a share of the total number of employed EU citizens in the EU	0.9%	0.9%	(-0.0 pps)
	2021	**2020**	**∆ 2020/2021**
4. Number of postings[7] (of employed and self-employed), all ages (no. of PDs A1) ***	3.6 million[8]	3.7 million	(-4.4%)
… equals approximate number of persons (estimated number)[9]	2.6 million	2.5 million	(+3.2%)
	2020	**2019**	**∆ 2019/2020**
5. Annual return mobility (20-64 years) ****	589 000	721 000	(-18%)
… as a ratio to EU nationals leaving their country of origin in 2020 *****	75%	71%	(+4 pps)

Sources : * Eurostat population statistics [Migr_pop1ctz][10].** EU-LFS 2021, custom extraction by Milieu. *** HIVA-KU Leuven,

[3] EU-28 data used for France, Greece, Hungary, Malta and Poland in 2020 for reasons of data availability.

[4] According to Eurostat population statistics, the total working age population in the EU in 2021 was 263.7 million, and in 2020 264.6 million.

[5] According to EU-LFS statistics, the total active population in the EU in 2021 was 211 million, and in 2020 209.8 million.

[6] This refers to cross-border workers living in an EU country and working in an EU or EFTA country.

[7] Total number of PDs A1 issued by EU/EFTA countries referring to Art. 12 and 13 of Regulation 883/2004. PDs A1 are issued for persons insured in a Member State other than the Member State of (temporary) employment. The number of PDs A1 is not necessarily equal to the number of posted workers. Differences exist in the definition of 'posting' between Regulation (EC) No 883/2004 and Regulation 96/71/EC (Posting of Workers Directive).

[8] Of these, 2.2 million were covered under Art. 12 (~1.4 million persons), 1.3 million under Art. 13 (~ 1.2 million persons), 0.1 million for others (e.g. Art. 16).

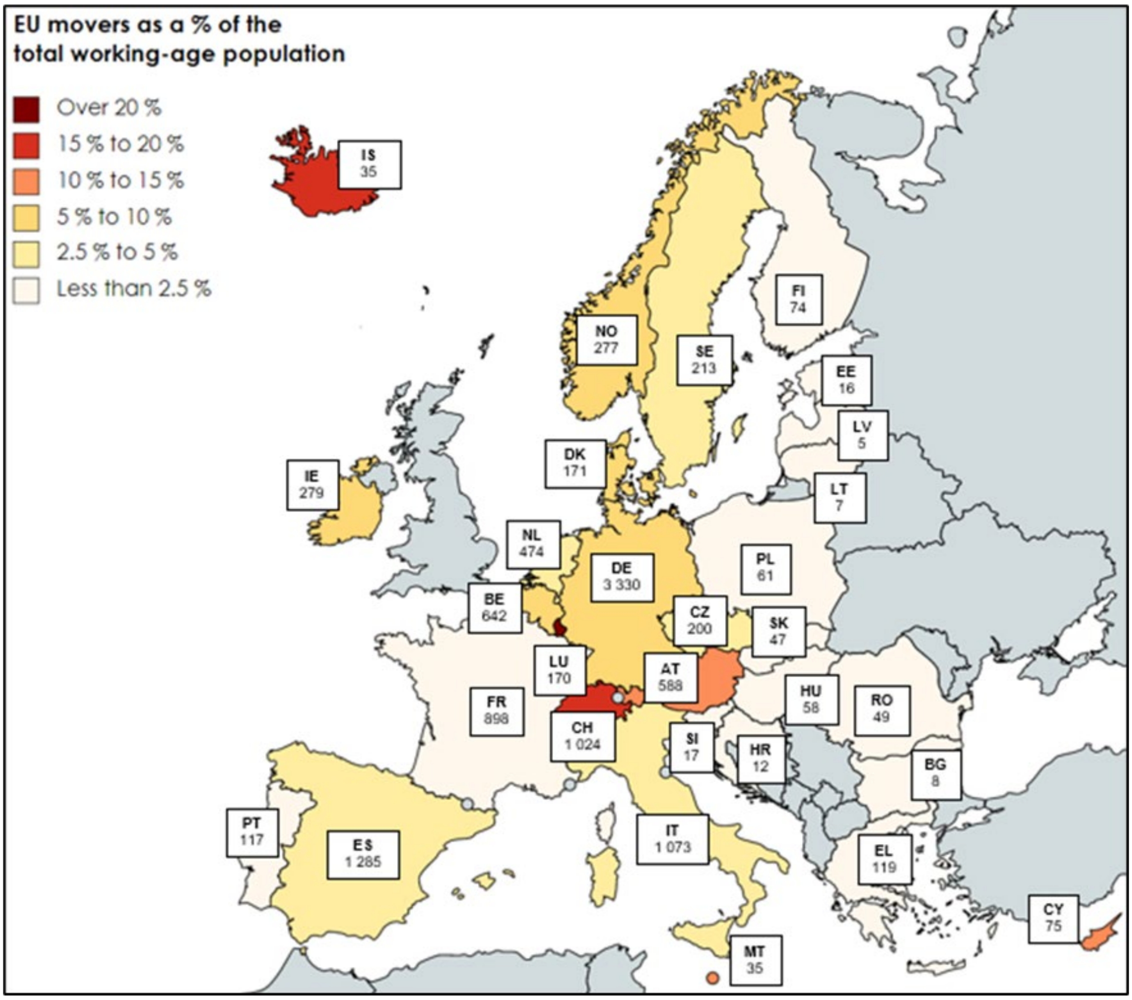
[9] Based on figures provided by 19 Member States. These statistics are discussed more extensively in De Wispelaere, et al. (2022), 'Posting of workers – Report on A1 Portable Documents issued in 2021', HIVA - KU Leuven, Leuven.

[10] Eurostat (2022c).

administrative data PD A1 questionnaire. These figures exclude the UK. **** Eurostat international migration statistics [Migr_imm1ctz]. Approximation by using numbers of nationals moving to their country of citizenship. ***** Eurostat, international migration statistics [Migr_imm1ctz, migr_emi1ctz][11]. Share of EU nationals moving to their country of citizenship (returnees) from EU nationals leaving their country of citizenship (outflows), age group 20-64. Figures are calculated based on aggregates excluding Cyprus, Portugal, Greece and France for both return mobility and outflows.

More than 30% of the working age EU movers (3.4 million) resided in Germany, remaining the main destination country for EU citizens in 2021. Luxembourg had the highest share of EU movers as a proportion of their total population at 42%, followed by Cyprus with 14%. The male to female ratio among EU movers in 2021 remained at 51% of movers being male and 49% being female. In 2021, 42% of the working age EU movers were between 35-49 years old.

Figure 1: EU movers aged 20-64 years in EU-27 and EFTA countries (1 000s and % of the total working age population), 2021



Numbers on stocks of EU-27 movers are estimated for: CY, FR, HR, EL, MT, PT;
Provisional data: FR, PL. estimated numbers: PL, RO.

Source: Eurostat, population [migr_pop1ctz], Milieu calculations.

Specific categories of working age movers. In 2021, there were ca. 1.7 million cross-border workers reported in the EU and EFTA, similar to 2020. The most important countries of origin were France (424 000) and Poland

[11] Ibid.; Eurostat (2022a).

(190 000), whereas the main destination countries were Germany (378 000) and Switzerland (345 000).

In 2021, the total number of postings in the EU and EFTA amounted to 3.6 million (-4.4% compared to 2020), distributed among an estimated 2.6 million individual persons (+3.2% compared to 2020).

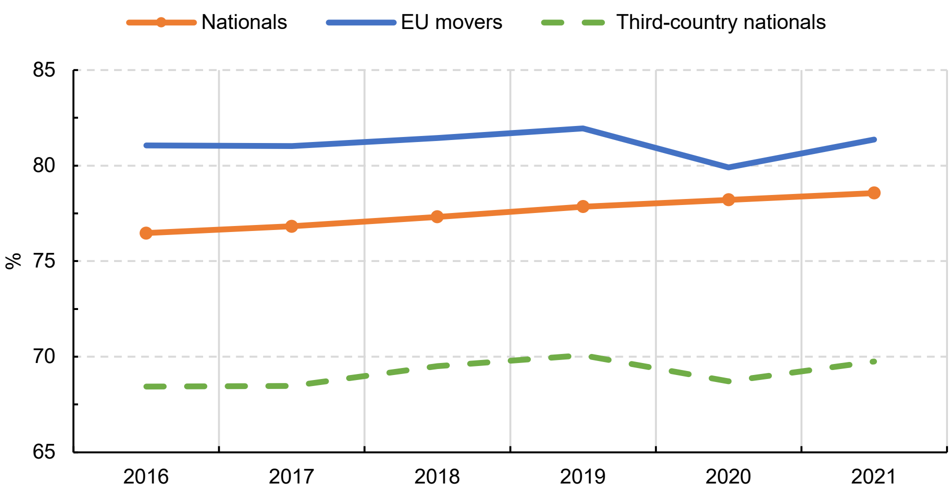
An estimated 589 000 movers returned to their countries of origin in 2020. The largest returning destination is Germany at 108 000.

The labour market performance of mobile workers

Overall trend. After a decrease in the activity and employment rates of EU movers and third-country nationals in 2020 due to the COVID-19 pandemic, rates were increasing towards pre-pandemic levels in 2021. Unemployment rates started decreasing but remained above pre-pandemic levels. Third-country nationals overall had lower employment and activity rates.

Labour market situation. At the EU level, 81% of EU movers (6.5 million individuals) were active on the labour market in 2021, compared to 79% of nationals and 70% of third-country nationals. EU movers and nationals both had an employment rate of 74% in 2021. This compares to 59% for third-country nationals. In 2021, EU movers had an unemployment rate of 9%. This was higher than nationals (6%) but lower than third-country nationals (16%). Compared to 2016, the unemployment rate has decreased in all three nationality groups.

Figure 2: Activity rate by group in the EU, 2016-2021[12]



Source: EU-LFS 2021, custom extraction by Milieu.

The highest employment rates of EU movers in EU Member States were found in the Netherlands (80%) and Germany (78%), while the lowest were found in Greece (56%) and Italy (64%) in 2021. There were 446 000 self-employed EU

[12] Activity rates by nationality group and country of residence in 2016-2021 are shown in Annex C.2 of the annual report.

movers during that year, most of whom were found in construction (28% of all self-employed movers), wholesale and retail trade (13%), and professional occupations (13%).

In 2021, 16% of EU movers and 12% of nationals had fixed-term employment contracts. Third-country nationals had fixed-term contracts at 27%. A similar pattern, although with smaller differences between the groups, was visible for part-time work.

Some determinants to labour market integration. At the EU level, female movers had an employment rate of 67% (vs. 82% for male movers), which varied significantly across the Member States. Female nationals in 2021 had an employment rate of 69% compared to 79% for men, and female third-country nationals had the lowest rate of employment by a significant margin at 47% (vs. 71% for male third-country nationals). The proportion of workers with fixed-term contracts were similar between male and female movers, both of which were slightly higher than that of nationals. The difference was much larger for part-time work: which stood at 28% for female nationals (against 7% for male nationals) and 37% for female EU movers (vs. 8% for male EU movers). For EU movers, nationals and third-country nationals alike, 35-49-year-olds had the highest employment rate at the EU level. Those aged 20-34 years old had the highest unemployment rate.

In 2021, 32% of EU movers had a high level of education, up from 28% in 2016. Similar patterns were identified among nationals. The proportion of third-country nationals with high educational attainment also increased, but stood at 24% in 2021. 28% of EU movers had low educational attainment, compared to 18% of nationals and 46% of third-country nationals.

The most common occupations among movers on an EU level were elementary occupations (18%), professionals (18%) and service and sales workers (16%). Both movers and third-country nationals were overrepresented relative to nationals in elementary occupations and craft and related trades. The largest sector of work for movers was manufacturing (17%). Relative to nationals, EU movers were most overrepresented in construction and accommodation and food services.

Cross-border workers in the EU and EFTA

Overall situation. There were ca. 1.7 million cross-border workers active in the EU and EFTA in 2021. The main countries of destination, Germany (378 000 incoming workers), Switzerland (345 000) and Luxembourg (212 000) attracted together almost 60% of all cross-border workers.

Characteristics of cross-border workers. Ca. 1.1 million cross-border workers were men (70% of the total) and 46% of cross-border workers were employed in (male-dominated) manufacturing and construction. Service sectors which account for substantial parts of cross-border work are transportation and storage, wholesale and retail trade and human health and social work (together 30% of cross-border workers).

Cross-border workers were most often (42%) between 35 and 49 years old. However, this population is ageing; the proportion of those above 50 years increased from 23% in 2016 to 27% in 2021 (ca. +60 000), while the proportion of those below 35 years decreased from 34% to 31% (ca. –52 000).

Table 2: Cross-border workers are concentrated in some sectors - Share of workers by economic sector (%), 2021

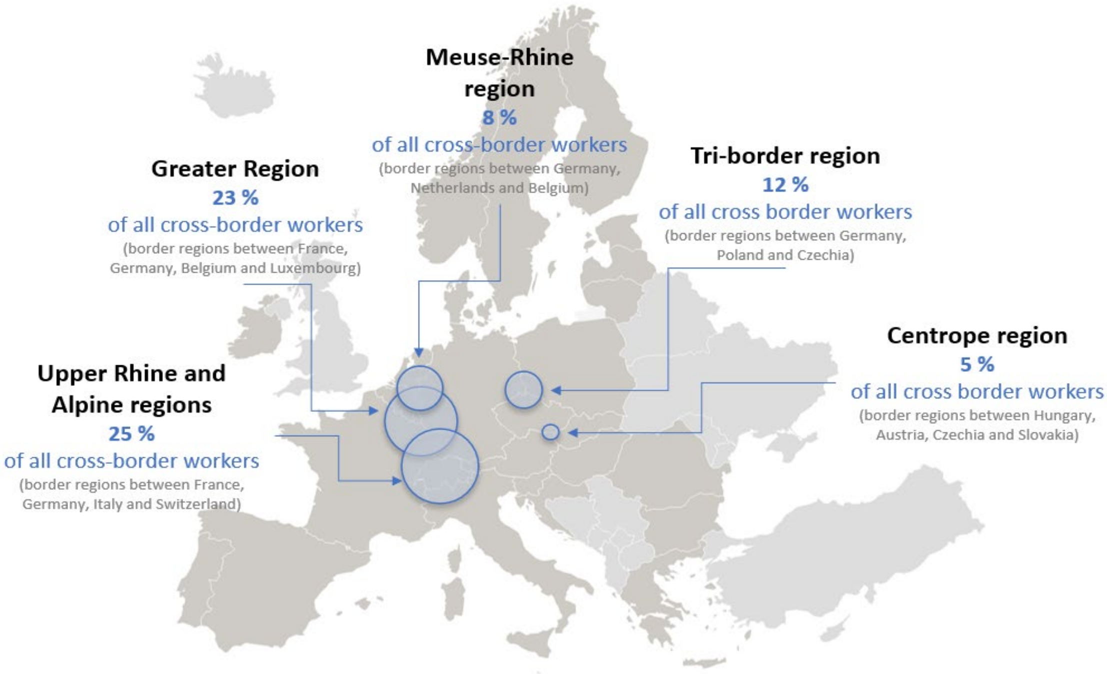
Economic Sector	Cross border workers	EU movers	Nationals
Manufacturing	26	17	17
Construction	20	10	7
Human health and social work	10	9	12
Transportation and storage	9	7	5
Wholesale and retail trade	9	12	14
All other sectors	26	45	45
	100	100	100

Source: EU-LFS 2021, custom extraction by Milieu

Compared to employed EU movers and nationals, cross-border workers were more likely to hold a medium level of education (54% vs 39% of EU movers and 49% of nationals).

Comparing cross-border work in macro-regions. The Alpine region (incl. bordering regions between France, Switzerland, and Italy), the Upper Rhine region (Switzerland, Germany, and France) and the Greater Region (France, Belgium, Luxembourg, and Germany) hosted almost 50% of the total flows of cross-border workers. Other significant areas for cross-border work were Meuse-Rhine region (Netherlands, Belgium, and Germany), Tri-border region (Germany, Poland, and Czechia) and Centrope region (Austria, Hungary, Slovakia, and Czechia).

Figure 3: Main macro-regions of cross-border work, 2021



Source: EU-LFS 2021, custom extraction by Milieu.

The majority of the flows were uni-directional towards the regions enjoying higher levels of economic development in Austria, Luxembourg, Germany and Switzerland. Hints of bi-directional flows were found in the Meuse-Rhine macro-region.

Manufacturing and construction were particularly important among cross-border workers going to Austria and Germany. Workers to Luxembourg, Belgium and Switzerland were mostly employed in service-related activities, including those requiring high skills, such as professional scientific and technical activities and financial and insurance services.

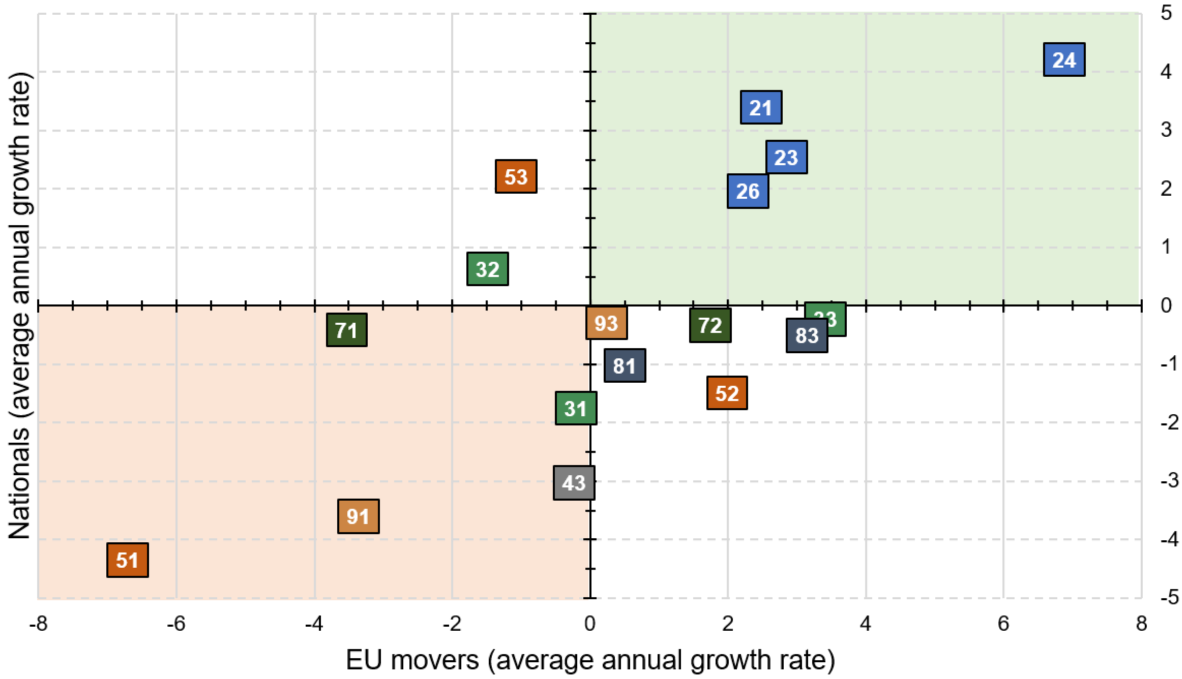
While several factors influence the extent and nature of cross-border work (e.g. socio-cultural and economic aspects), one key facilitator of cross-border movements of workers is the institutional cooperation among border regions. This is particularly strong in certain macro-regions (e.g. Upper-Rhine and Greater Region).

Occupational mobility among movers

Overall situation. There are clear signs of a general shift towards professional occupations among EU movers from 2016 to 2021. This has been accompanied by a process of skill-based polarisation over the same period, represented by a decreasing share of medium skilled mobile workers. The contribution of EU movers to total employment is highest among occupations requiring low-to-medium skills, such as cleaners and helpers (10% of total employment; 559 000 movers), labourers in mining, construction, manufacturing, and transport (8%; 334 000), and building and related trades workers (7%; 445 000).

Analysis at ISCO-2D level. The limitations of data collected at the ISCO-2D level, including its broad measurement of skills and tasks performed, and its tendency to mask notable differences between and within occupations, hinder the ability to identify whether specific jobs, such as nurses or pharmacists, are experiencing labour shortages.

Figure 4: Change in the distribution of EU movers and Nationals at EU level, average annual growth rate, 2016-2021



	Professionals
21	Science and Engineering Professionals
23	Teaching Professionals
24	Business and Administration Professionals
26	Legal, Social and Cultural Professionals
	Technicians and Associate Professionals
31	Science and Engineering Associate Professionals
32	Health Associate Professionals
33	Business and Administration Associate Professionals
	Clerical Support Workers
43	Numerical and Material Recording Clerks
	Service and Sales Workers
51	Personal Service Workers
52	Sales Workers
53	Personal Care Workers
	Craft and Related Trade Workers
71	Building and Related Trades Workers (excluding Electricians)
72	Metal, Machinery and Related Trades Workers
	Plant and Machine Operators and Assemblers
81	Stationary Plant and Machine Operators
83	Drivers and Mobile Plant Operators
	Elementary Occupations
91	Cleaners and Helpers
93	Labourers in Mining, Construction, Manufacturing and Transport

Note. Only occupations where EU movers are more than 2% at EU-level are shown. The average annual growth rate is compound and is expressed in percentage (%). Colored quadrants indicate occupations where EU movers and nationals experienced similar increasing (green) or decreasing (red) trends.

Source: EU-LFS 2021, custom extraction by Milieu.

Identifying potential labour market pressures. From 2016 to 2021, professionals saw the strongest employment growth (4% vs. average of - 0.7%) and job vacancy rate (JVR, as proxied by information on online job advertisements) in 2021 (5% vs. average of 3.8%), with the highest employment growth and JVR found among information and communications technology professionals (8.2% and 13.1%, respectively). In contrast, elementary occupations saw the lowest employment growth (-2.3%) and JVR (3.7%). Italy and Bulgaria had relatively weak employment growth (-0.3 and - 0.6%) across most occupations, while Spain, Poland, Romania and Bulgaria had the lowest JVRs, rarely exceeding 4%.

Occupational trends among EU movers. In 2021, the most popular occupations among EU movers decreased at the EU level across all population groups, such as cleaners and helpers (9% of all EU movers), building and related trades workers (7%), personal service workers (6%), sales workers (6%), and labourers in mining, construction, manufacturing, and transport (5%). However, the size of the mobile labour force relative to total employment is relatively minor.

The 2016-2021 period also saw a significant decrease in the share of mobile workers with a medium level of education and an increase in the share of those with a high or low education level. Additionally, EU movers were more likely to be overqualified for low skill jobs compared to the local population.

Linking labour shortages and labour mobility. Based on limited data availability, it appears that only a few prevalent occupations among EU movers indicate signs of a potential labour shortage, with science and engineering professionals being the most-in-demand among the five Member States studied in further detail.

In Italy, France and the Netherlands, signs of labour shortages are mainly indicated by occupations requiring low-to-medium skills: e.g. numerical and material recording clerks; labourers in mining, construction, manufacturing and transport; and metal, machinery and related trades workers.

In contrast, many high-skilled occupations in Germany and Spain, such as business and administration professionals and science and engineering associate professionals, indicate signs of labour shortages.

The overall small share of EU movers relative to nationals suggests that intra-EU labour mobility is currently unable to significantly mitigate potential labour shortages at the occupational level in the short-term.

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