INTRA-EU LABOUR MOBILITY

IN 2022

9.9 mil.
EU MOVERS BETWEEN 20-64 YEARS*

3.8%
OF EU WORKING AGE POPULATION ARE MOVERS **

83%
OF MOVERS ARE ACTIVE IN THE LABOUR MARKET**

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

*After a dip in 2020-21, **mobility figures are almost back to pre-pandemic levels**...*

Inflows and **outflows** of EU movers increased to 859 000 and 505 000 (+7% each), respectively

Cross-border workers and **postings** increased to 1.8 million (+8%) and 4.6 million (+27%), respectively

Movers returning to their home country increased to 656 000 (+11%)

The main countries of destination and origin of EU movers remained stable

- More than half of movers (55%) live in: **Germany** **Spain** or **Italy**
- Almost half of movers (47%) are from: **Romania** **Poland** or **Italy**

Employment rate of EU movers increased by 3 percentage points relative to 2021 reaching 77%

This is higher than the employment rate of nationals (75%) and third country nationals (69%)

The education level of EU movers is rising...

While in 2016, 28% of movers had higher education, in 2022 this share increased to 32%

...together with employment in high skills sectors

Employment of movers in ICT sector has increased by 56% since 2017, indicating an increase in demand for professionals throughout the EU

The population of retired movers is small

It is less than 2% of retired population

The number of exported pensions is growing...

from 4.6 million (2018) to 5.4 million (2021) beneficiaries

...but their value remains relatively small

1.1% of the value relative to national pensions in 2021

Main indicators of intra-EU labour mobility

Type of mobility	1 January 2022	1 January 2021	Change 2021/2022
1. Long-term EU movers in the EU according to Eurostat population statistics			
• **All ages** *	13.7 million	13.7 million	(-0.3%)
• **Working-age** (20-64 years) *	9.9 million	10 million	(-0.9%)
Working-age movers as a share of the total working-age population	3.8%	3.8%	(±0.0 pps)
	Annual average 2022	**Annual average 2021**	**Change 2021/2022**
2. **Long-term EU and EFTA movers in the EU according to the EU-LFS**			
• **Working-age** (20-64 years) **	8.4 million	8.0 million	(+4.5%)
• … of which **active movers** (employed or looking for work) **	7 million	6.5 million	(+6.6%)
Active movers as a share of the total labour force	3.4%	3.2%	(+0.2 pps)
3. Cross-border workers + (20-64 years)	1.8 million	1.7 million	(+8%)
As a share of the total number of employed EU citizens in the EU ++	1%	0.9%	(+0.1 pps)
	2022	**2021**	**Change 2021/2022**
4. Number of postings +++ (of employed and self-employed), all ages (no. of PDs A1) ***	4.6 million ++++	3.6 million	(+27%)
… equals approximate number of persons (estimated number) +++++	3.1 million	2.6 million	(+19%)
	2021	**2020**	**Change 2020/2021**
5. Annual return mobility (20-64 years) ****	656 000	589 000	(+11%)
… as a ratio to EU nationals leaving their country of origin in 2020 *****	83%	75%	(+8 pps)

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Executive summary

The annual report on Intra-EU Labour Mobility 2023 presents updated insights into the labour mobility trends in EU and EFTA countries using data from 2021 and 2022. The analysis encompasses the mobility of all working-age EU citizens (aged 20-64). In the first Chapter the report delves into the movement and characteristics of the mobile population in the EU and EFTA. Chapter 2 expands on the labour market participation and integration of EU movers. Lastly, in Chapter 3 the intra-EU mobility of seniors and retired movers is analysed, also exploring the relationship between intra-EU mobility and exports of pensions.

1 Recent developments on the mobile working-age population

Overall, the **number of working-age EU movers** remained **relatively steady** over the last five years, being **at around 9.9 million**[1] in 2022 out of the total number of 13.7 million movers of all ages. Despite a 7% rise of both the number of working-age EU movers entering and leaving EU and EFTA countries in 2021, mobility has not yet returned to the pre-pandemic levels of 2019.

EU movers are predominantly young and male. 58% of the incoming EU and EFTA movers in 2021 were male. This male predominance was particularly pronounced in Eastern and Central European destination countries like Poland, Bulgaria and Lithuania. Furthermore, incoming EU and EFTA movers tend to be on the younger side, suggesting a preference among those in the early stages of their careers for relocating to other EU and EFTA countries. The Nordic countries and the Netherlands receive the highest proportions of the youngest age group (20-34-year-olds).

The main countries of origin and destination of EU movers have been consistent over the years. Romanians continue to lead, constituting 25% of all EU movers, followed by Polish nationals at 12%, and Italians at 10%[2]. In terms of destination: just over 33% of working-age EU movers (3.4 million individuals) live in Germany, solidifying its status as the top destination for EU movers in 2022. Luxembourg stood out with the highest share of EU movers relative to its total population (41%).

The number of cross-border workers and postings returned to pre-pandemic levels. There were approximately 1.8 million cross-border workers reported in the EU and EFTA in 2022. This represents an 8% increase in comparison to 2021, and a full bounce back to pre-pandemic levels. Similarly to the previous years, the most important countries of origin were France, Germany and Poland, whereas the main destination countries were Germany and Switzerland. When it comes to postings, the total number of issued Portable Documents A1 (PDs A1) amounted to 4.6 million (+27% compared to 2021).[3] Germany accounts for most of the increase in the number of issued posting documents.

There has been an increase in the number of movers returning to their home countries. An estimated 656 000 movers returned to their countries of origin in 2021, an 11% increase compared to 2020. The largest returning destination is Romania at 119 000.

1 This estimate is based on Eurostat population statistics. According to EU-LFS data, which is differently sampled, there are just over 8 million EU movers. For a more extensive discussion of these data sources, see Annex B of the full report.

2 Note that these estimates are based on EU-LFS data, as the required detailed is not available in Eurostat population statistics.

3 PD A1 are administrative documents which indicate that a posted worker is covered by the social security system of the country from which the posting takes place. See chapter 1.4.2.

2 Recent developments in the labour market integration of mobile workers

In 2022, both activity (83%) and employment (77%) rates of EU movers experienced a significant increase, surpassing 2019 levels. EU movers have thus been relatively more successful in securing employment opportunities compared to nationals (75% employment rate) and third-country nationals (69%). The highest employment rates of EU movers were found in Cyprus, the Netherlands (both at 85%), Switzerland (83%) and Germany (81%), while the lowest were found in Greece (57%) and Italy (61%) in 2022[4].

The number of self-employed EU movers almost returned to pre-pandemic levels. This population decreased significantly in 2020 during the COVID-19 pandemic, but, with a staggering rise of 22% relative to 2020, it has since 2021 almost returned to pre-pandemic levels. While the share of self-employed third country nationals showed similar patterns, that of EU nationals remained relatively stable during the pandemic.

The share of EU movers with part-time contracts and fixed-term contracts is slowly declining. In 2017, nearly 20% of EU movers had fixed-term contracts; by 2022, this figure had reduced to 15%. Likewise, in 2017, nearly 24% of EU movers were engaged in part-time work, and by 2022, this had decreased to 21%. For both types of contracts, EU movers fall between third-country nationals (with higher figures) and nationals (with lower figures).

Additional efforts to integrate female EU movers in employment are needed. At the EU level, the employment rate of female movers is 14 percentage points lower than that of male movers. This is slightly above the gap observed for nationals and well below the 26-percentage-point difference between female and male third country nationals. The gender gap increases to 28 percentage points when looking at part-time EU workers, well above the 20-percentage-point difference observed for nationals.

While the **unemployment rates** for movers in older age groups (35-49 and 50-64) are higher than for nationals, in the age group 20-34, movers and nationals have similar unemployment rates.

The level of education among EU movers is increasing. In 2022, 32% of EU movers had a high level of education, up from 29% in 2017. Similar patterns were identified among nationals and third country nationals.

The **most common occupations among movers** on an EU level were Elementary occupations (19%), Professionals (18%) and Service and sales workers (16%). The largest sector of work for movers was Manufacturing (15%). The number of movers related to household activities has decreased by about one-third, while the Information and Communication sector has shown remarkable growth of 56%, signalling increased demand for professionals. Additionally, the Transportation and Storage sector has seen a substantial 40% increase, indicating expanding opportunities post-COVID-19.

4 Member States where the estimates are of low reliability are omitted from this summary.

3 Cross-border pensions

In 2022, there were **1 437 000 retired movers** aged 60+ compared to **8 013 000 economically active movers** aged 20-64 in the EU and EFTA countries. Similarly, 2% of retirement age people are mobile compared to 4% of economically active persons who are mobile.

Considering the growing prevalance of both mobile groups in recent years, **the export of pensions plays a key role in ensuring fair labour mobility**. The export of pensions is also a consequence of labour mobility. For these reasons, a co-evolution of labour mobility and cross-border pensions is to be expected, albeit with a time lag.

From 2018 to 2021, the **number of exported pensions** grew from 4.6 million to 5.4 million. As a result, the number of exported pensions as a proportion of all national pensions increased from 3.7% in 2018 to 4.3% in 2021. The amount paid increased from EUR 18.02 billion in 2018 to EUR 22.08 billion in 2021. The **value of cross-border pensions** as a share of all national pensions shifted from 1.0% in 2018 to 1.1% in 2021.

The **top exporters of pensions in 2021** were Germany (1 292 000 pensions), France (1 032 000), Switzerland (876 000), Poland (627 000), the Netherlands (220 000), and Austria (195 000). Together, they accounted for approximately three-quarters (75%) of all pensions exported across the EU and EFTA.

The **top importing countries of pensions in 2021** were Germany (898 000), Italy (864 000), Spain (796 000), France (520 000), and Portugal (465 000). Together these five Member States accounted for two-thirds (66%) of all pensions imported across the EU and EFTA in 2021. Many of these top importing countries (i.e. Germany and France) are among the top exporting countries of cross-border pensions as well.

A **key channel of cross-border pensions** is from western European countries (i.e. France and Germany) to southern European destinations (i.e. Spain, Italy and Portugal). For example, in 2021, over half of all pensions exported from France went to Portugal (353 000) and Spain (312 000), and Germany exported 210 000 pensions to Spain.

Several countries are **both main destination countries for labour mobility and main exporters of cross-border pensions**, such as Germany and France. However, other important destination countries for labour mobility, such as Spain, do not appear as key exporters of cross-border pensions.

Conversely, some countries are **both main sending countries for labour mobility and main importers of cross-border pensions**, such as Italy and Portugal. Nevertheless, other significant sending countries of active movers, such as Poland, are not main importing countries of cross-border pensions.

These trends appear to suggest an **inverse relationship between the directions of flows of intra-EU mobility and cross-border pensions** (e.g. labour mobility sent to one country results in pensions being exported from the same country). Nonetheless, this relationship is imperfect, as certain countries demonstrate. Part of this may be due to the fact that data on cross-border pensions can obscure a range of scenarios involving movement between countries, such as pensioners moving to a country for retirement where they have no previous work history or active movers staying in their host country after retirement.

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