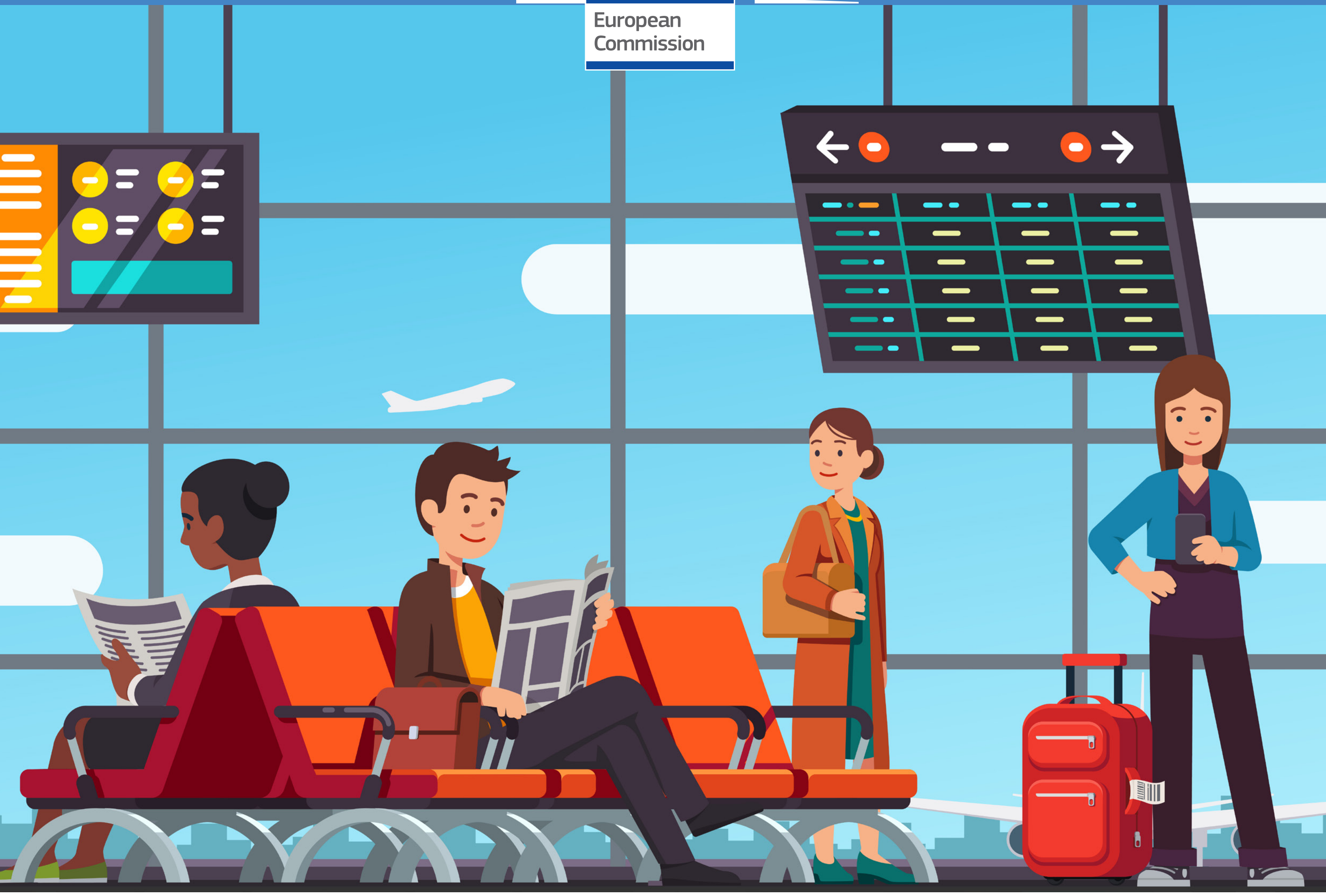


Intra-EU Labour Mobility at a glance

Main findings of the Annual Report on Intra-EU Labour Mobility 2021

LEGAL NOTICE

Manuscript completed in December 2021

Luxembourg: Publications Office of the European Union, 2022

PDF ISBN 978-92-76-47154-7 ISSN 2600-2604 doi:10.2767/475059 KE-CB-22-001-EN-N

INTRA-EU LABOUR MOBILITY

IN 2020

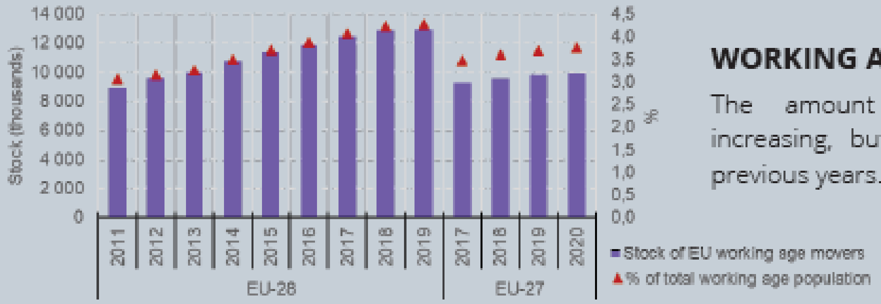
13 mil. EU MOVERS*

3.8% PROPORTION OF TOTAL EU LABOUR FORCE **

7 mil. ACTIVE MOVERS**

1.5 mil. CROSS-BORDER WORKERS**

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



WORKING AGE EU-27 MOVERS

The amount of EU movers keeps increasing, but at a lower rate than in previous years.

The main countries of origin of EU movers are **Romania** (>20%), **Italy** and **Poland** (together 20%), **Portugal**, **Croatia** and **Bulgaria** (20%). The main destination countries are: **Germany** (1/3) and **Spain**, **Italy** and **France** (another 1/3).

55% of the movers are **20-49 years old**. Men and women are equally mobile.

MOBILITY IS MOSTLY NOT A LIFETIME DECISION:
Return mobility has increased from 2016-2019 by 20% - up to almost 800 000/year.

Returnees are frequently **high skilled** (47%), rather **young** (less than 49), and a bit more frequently **men** often **without family**.

Even if number of EU-27 citizens living in the UK is still growing, there's a **lower attractiveness** of the **UK as a destination** for EU mobile workers than in the past.

Manufacturing continues to be the main sector of employment for EU-27 movers. Movers are strongly overrepresented in the **Construction sector**, in the area of **accommodation** and **food services**, and as **workers in private households**.

Movers' employment rate decreased by 2.6 % whereas the overall employment rate decreased by 0.7 %, reflecting the impact of the **COVID-19 pandemic**. This is due to over-representation of movers in sectors that were heavily impacted by the pandemic, especially accommodation and food services.

Introduction

The annual reporting on intra-EU labour mobility provides updated information on labour mobility trends in EU and EFTA countries based on 2019/2020 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 (employed and unemployed). Each report also covers special topics associated with intra-EU labour mobility, according to current developments and policy needs.

The 2021 edition focuses on intra-EU professional mobility in the context of the COVID-19 pandemic, on the one hand, and, on the other, return mobility of mobile European citizens.

The two main data sources used are Eurostat population (including international migration) statistics and the European Labour Force Survey (EU-LFS).[1] The population statistics are based on the official population register, leading to a certain time-lag in data provision, but with the advantages of a real inventory. The Labour Force Survey is in general more detailed and available with a shorter delay, but the sample size sometimes restricts a detailed analysis of small groups.

Mobility of EU citizens

The number of EU working-age citizens living in another EU and EFTA Member State than their country of citizenship (hereafter 'EU movers') increased by a small margin between January 2019 and January 2020.

On 1 January 2020, there were 9.9 million EU movers, an increase of about 100 000 or 1.6 % compared to a year before. This is lower than previous years, where increases were 2.5 % (2019 to 2018) and 3.2 % (2018 to 2017). Additionally, there were 1.3 million EU movers resident in EFTA countries, an increase of 2 % compared to 2019.

As a share of the EU working-age population, EU movers have increased steadily since 2017. At the reference date 1 January 2020 they made up 3.8 % of the working-age population in the EU, increasing by a similar rate every year since 2017, when the proportion was 3.5 %. Due to the large numbers of EU movers in Switzerland, EU movers made up a significantly larger proportion of the working-age population in EFTA countries at 15.1 %.

1 The population statistics is based on the official population register leading to a certain time-lag in data provision, but with the advantages of a real inventory. The Labour Force Survey is in general more detailed concerning the employment situation and available with a shorter delay, but the sample size sometimes restricts a detailed analysis of small groups.

Table 1: Composition of intra-EU mobility

Type of mobility	1 January 2020 EU-27	1 January 2019 EU-27	Change 2019/2020 EU-27	1 January 2019 EU-28
1. Long-term movers according to Eurostat population statistics				
• **all ages** *	13.5 million	13.2 million	+2 %	17.8 million
• **working age** (20-64 years) *	9.9 million	9.8 million	+2 %	12.9 million
working age movers as share of total working age population[2]	3.8 %	3.7 %	0.1 pps	4.3 %
	Annual average 2020 EU-27	Annual average 2019 EU-27	Change 2019/2020 EU-27	Annual average 2019 EU-28
2. Long-term movers according to EU-LFS				
• **working age** (20-64 years) **	8.7 million	8.9 million	-2 %	11.9 million
• …of which **active movers** (employed or looking for work) **	7 million	7.3 million	-4 %	9.9 million
active movers as share of total labour force[3]	3.4 %	3.6 %	-0.1 pps	4.2 %
• …of which born outside the country of residence	8 million	8.2 million	-3 %	11.2 million
3. Cross-border workers[4] (20-64 years)**	1.5 million	1.6 million	-3 %	1.5 million
as share of total employed EU-27 citizens in the EU-27[5]	0.8 %	0.9 %	-0.1 pps	0.6 %
	2020 EU-27	2019 EU-27	Change 2019/2020	2020 EU-28
4. Number of postings[6] (of employed and self-employed), all ages (no. of PDs A1) ***	3.7 million[7]	4.5 million	-18.5 %	4.6 million
…equals approximate number of persons (estimated number)[8]	2.4 million	3.06 million	-22 %	
	2019 EU-27	2018 EU-27	Change 2018/2019	2019 EU-28
5. Annual return mobility (20-64 years)****	720 915 (2019)	677 502 (2018)	+6 %	793 411 (2019)
as ratio to EU-28 nationals leaving their country of origin in 2019 *****	71 %	66 %		69 %

[2] According to Eurostat population statistics, the total working age population in the EU-27 in 2020 was 264.6 million and in 2019 it was 265.1 million.

[3] According to EU-LFS statistics, the total active population (labour force) in the EU-27 countries was 203.2 million in 2020 and 204.9 million in 2019; in the EU-28 countries in 2019 it was 236.4 million.

[4] This refers to cross-border workers living in an EU-27 country and working in an EU-27 or EFTA country.

[5] The number of total employed EU-27 citizens in the EU-27 in 2020 was 183 million and in 2019 185 million. This number includes employed EU-27 nationals working in their country of citizenship, employed EU-27 movers in another EU-27 or EFTA country and cross-border workers living in an EU-27 country and working in an EU-27 or EFTA country. The number of cross-border workers used for this calculation only includes cross-border workers who are nationals of their country of residence; cross-border workers who are not nationals of their country of residence would also be EU-28 movers.

[6] The number indicates the total number of PDs A1 issued by EU-28 Member States and EFTA countries referring to Articles 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. Note that differences exist in the definition of 'posting' between Regulation (EC) No 883/2004 and Regulation 96/71/EC (Posting of Workers Directive).

[7] …of which 3.1 million fall under Art.12 (approx. 1.4 million persons), and 1.3 million under Art.13 (approx.1 million persons).

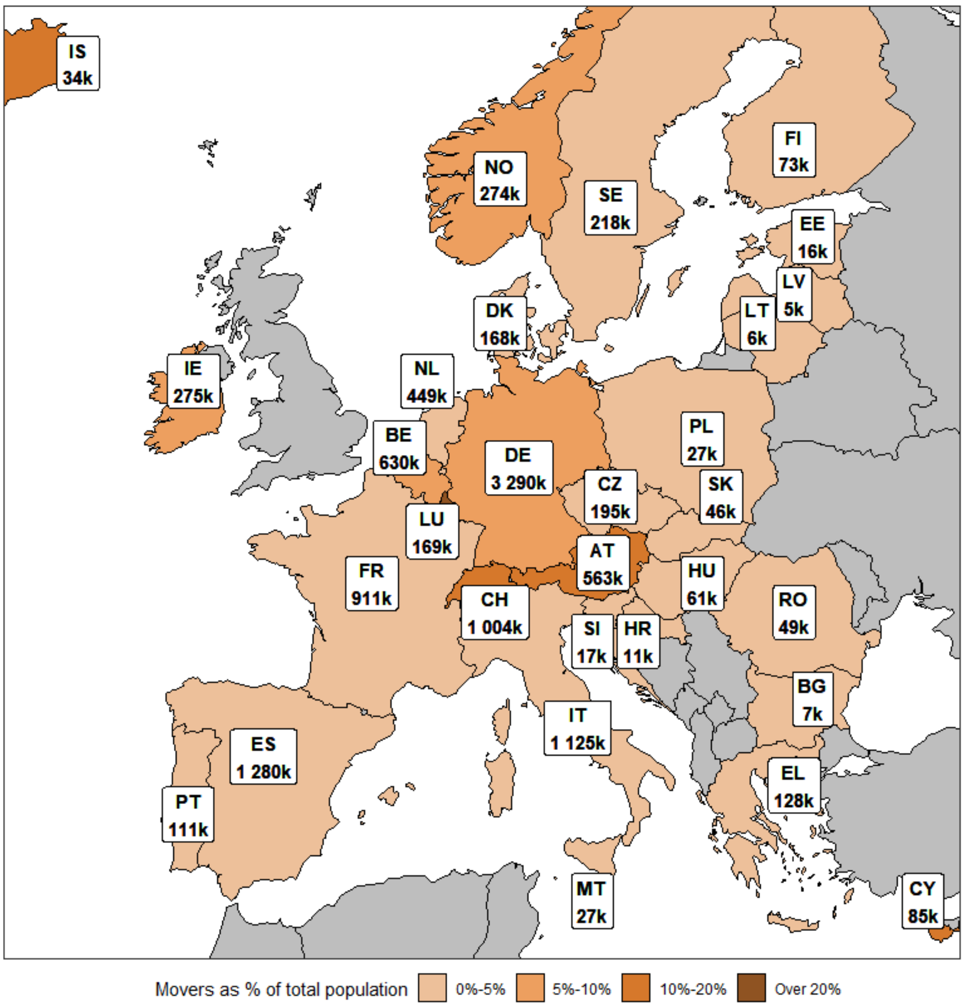
[8] For further information, see De Wispelaere, F., De Smedt, L. and Pacolet, J. (2020), Posting of workers. Report on A1 portable documents issued in 2020, Network Statistics FMSSFE, European Commission, Brussels.

*Source: Eurostat, population statistics [migr_pop1ctz]
**Source: Eurostat, EU-LFS [LFSa_pganws]
***Source: HIVA-KU Leuven, administrative data PD A1 questionnaire.
****Source: Eurostat, international migration statistics [migr_imm1ctz]. Approximation by using numbers of nationals moving to their country of citizenship.
*****Source: Eurostat, international migration statistics [migr_imm1ctz, migr_emi1ctz]. Share of EU-27 nationals moving to their country of citizenship (returnees) from EU-27 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, as figures are not available for outflows of nationals.

Germany hosts around one-third of EU movers, while Spain, Italy and France together host another third.

In 2020, there were 3.3 million movers resident in Germany, making it the largest destination country by a significant margin. Spain, Italy and France each host approximately 1 million each. Other than these countries, only Belgium and Austria host more than half a million movers. Outside of the EU, Switzerland is a significant destination country, hosting just over 1 million movers, hence overtaking France as a destination country for EU movers.

Figure 1: EU movers aged 20-64 years in EU-27 and EFTA countries (1 000s and % of the total working age population), 2020



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.

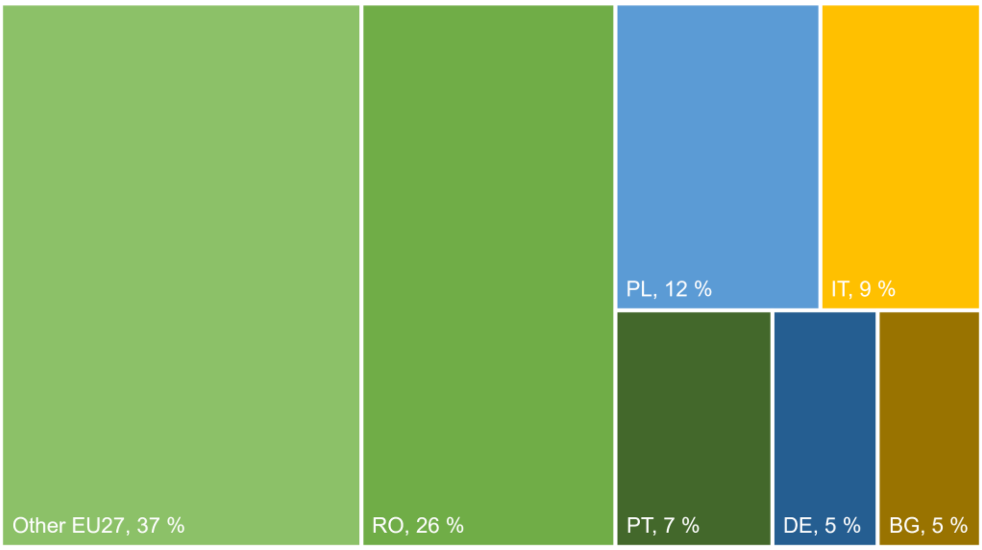
The number of movers increased in all examined countries but three during 2019, but generally at a lower rate than in previous years. The three exceptions were France, Italy and Greece. In France and Italy, stocks decreased by less than 1 %. Greece experienced a significant decrease of 14 %, although this is small in absolute numbers. The largest increases were seen in Portugal (13 %), the Netherlands (10 %) and Hungary (9 %).

In 2019, 273 400 EU movers arrived in Germany, about three times as many as arrived in Spain (92 700), which is the second most attractive country of destination.

By far the biggest group of active movers originated from Romania, followed by Polish, Italian, Portuguese, German and Bulgarian mobile workers.

The composition of EU movers by citizenship has remained broadly the same since 2015.

Figure 2: Principal countries of origin of EU active movers aged 20-64, 2020



Figures exclude movers born in their country of residence.

Source : Eurostat, EU-LFS, specific extractions, Milieu calculations.

Labour mobility between the European Union and the United Kingdom

Comparable to recent years, at the beginning of 2020 nearly 600 000 UK movers lived in EU Member States and 570 000 UK citizens of working age had their usual residence in EU Member States. Nearly 30 % of these UK citizens resided in Spain. Other significant destinations were France, Ireland and Germany. Altogether, these four countries hosted more than two thirds of UK citizens living in EU Member States.

Inflows of movers from EU Member States to the UK decreased by around one-fifth between 2016 and 2019; outflows of EU citizens from the UK increased by 27 %. There is no uniform 'Brexit effect' on return mobility from the UK. While outflows of EU movers from the UK have increased since 2016, the extent varies.

Among significant countries of origin, outflows from the UK to Poland have decreased over the period, and those to Romania substantially increased.

The number of UK citizens acquiring the citizenship of another EU Member State quadrupled from around 6 700 in 2016 to 30 000 in 2019. The number of EU citizens acquiring UK nationality climbed from 17 000 in 2016 to 40 000 in 2020, with the highest levels in 2017-2018.

Mobility of EU workers

The number of active EU movers decreased for the first time since 2012

However, the decline was small at 2 % or 177 000 less than 2019, out of a total 8.7 million active movers. The number of active movers went down most in Germany, France, Italy and Spain. The decline is mainly due to decreasing numbers of Romanian and Polish movers, which are down 170 000 and 117 000 compared to 2019.

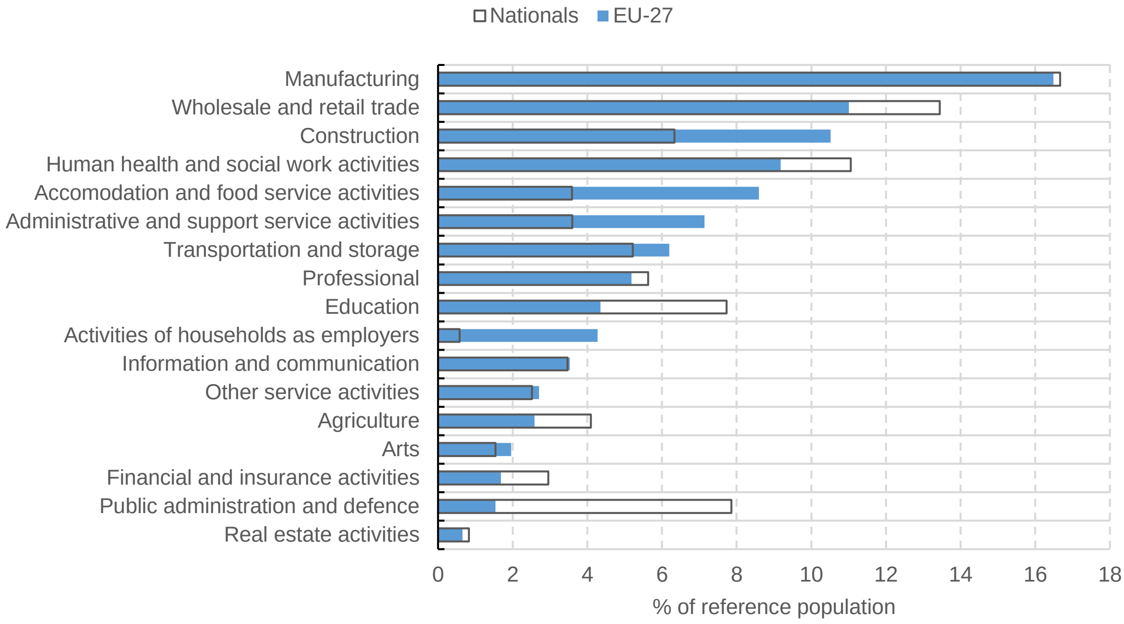
COVID-19 negatively affected the employment of EU movers

In a break with previous trends, and fuelled by the COVID-19 pandemic, the employment rate of EU mobile workers decreased and the unemployment rate increased in 2020. Compared to 2019, the employment rate of movers fell by 2.6 percentage points to 72.7 %; this was a slightly larger drop than the employment rate of non-mobile workers, which fell by 0.5 percentage points to 73.3 %. The unemployment rate of movers increased by one percentage point to 9 % in 2020. Unemployment among nationals remained the same as in 2019 (6 %). The higher unemployment level of movers was driven by a significant increase in Spain notably due to decreased demand in the accommodation and food services industry during the pandemic.

The largest sectors of employment for EU mobile workers are manufacturing, wholesale and retail trade, and construction

In 2020, 10 % or more movers worked in each of these sectors. Human health and social work, accommodation and food services, administrative and support services, and transport and storage were also important sectors, each employing 5-10 % of movers. Compared to nationals, mobile EU workers were overrepresented in sectors such as construction, accommodation and food services, administrative and support services, and activities of households as employers. On the other hand, they were underrepresented in the public service sector and agriculture, economic activities traditionally occupied by nationals.

Figure 3: Sectors of activity among EU movers and non-mobile citizens aged 20-64, 2020



Aggregate: EU-27
Results exclude movers born in their country of residence.
Sectors are only shown when numbers are above reliability limits[9].

Source: Eurostat, EU-LFS, specific extractions, Milieu calculations.

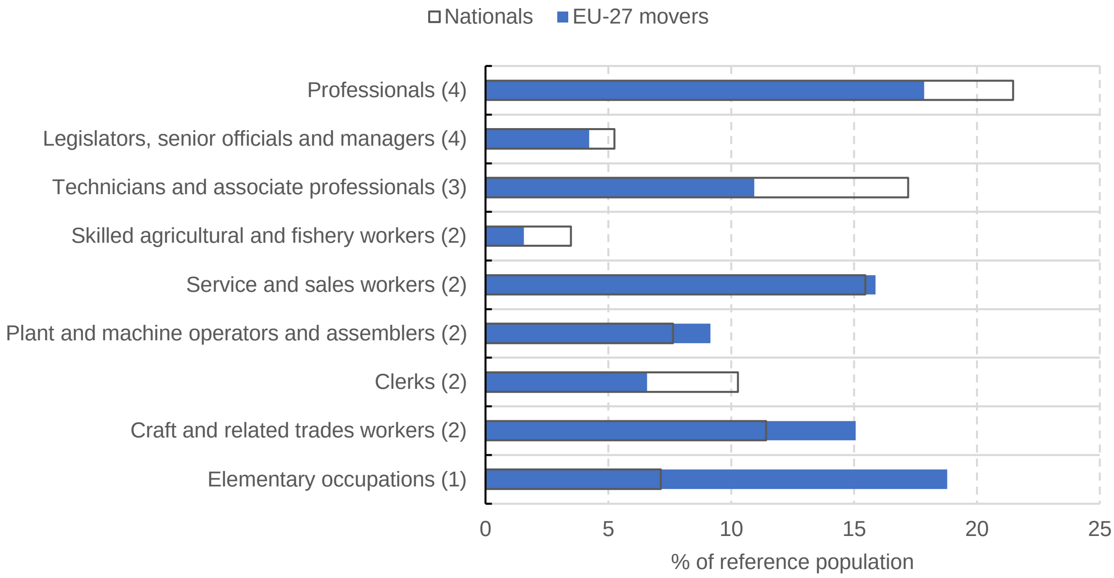
Qualification levels of movers

As in previous years, movers were more involved in low-skilled elementary occupations than nationals in 2020. Movers also worked slightly more often as craft and related trade workers, which corresponds to a medium skill level. On the other hand, they were underrepresented as technicians and (associate) professionals, corresponding to a high skill level.

However, the proportion of EU movers with tertiary education has steadily increased since 2016. In 2016, 30 % of movers had a high educational attainment level, while in 2020 the proportion was 35 %. The increase from 32 % in 2019 is the largest in the time span. Nonetheless, still more than a quarter of movers had a low educational attainment level in 2020, with no significant decrease since 2016. The share of movers with a low educational attainment level remained constant between 2019 and 2020.

[9] Excludes the sectors ‘electricity’, ‘mining and quarrying’, ‘other service activities’, ‘real estate activities’ and ‘water supply and sewerage’, ‘activities of extraterritorial organisations and bodies’; each made up <1 % of employment in each reference group.

Figure 4: EU movers and nationals aged 20-64, by occupational group, 2020



EU aggregate: EU-27
Results exclude movers born in their country of residence.
Source: Eurostat, EU-LFS, specific extractions, Milieu calculations.

Demographic characteristics of mobile workers

In 2020, the employment rate of male movers was 80 %, while for female movers it was 65 %. Though both decreased during the COVID-19 pandemic, they did so at a similar rate, meaning that the 15-percentage-point gender gap in employment rates from 2019 was retained. The unemployment rate of females reached 11 % in 2020, up from 9 % in 2019 while that of males increased from 7 % to 8 %.

More EU movers are of working age than nationals: in 2020, around three quarters of movers were of working age, and 16 % were under the age of 20. By comparison, 58 % of non-mobile nationals were of working age.

Cross-border workers

The number of workers residing in one EU/EFTA Member State and working in another (cross-border workers) decreased by 3 % in 2020 compared to 2019. In total EU and EFTA countries registered 1.3 million cross-border workers. The two largest destination countries are Germany (406 000) and Switzerland (321 000). Most of the 2019-2020 decrease is due to a 16 % decrease in Switzerland.

COVID-19 and intra-EU labour mobility

Intra-EU labour mobility reduced during the COVID-19 pandemic in 2020.

This is the case both for EU movers and for movers returning permanently to their Member State of citizenship from another Member State (i.e. returnees).

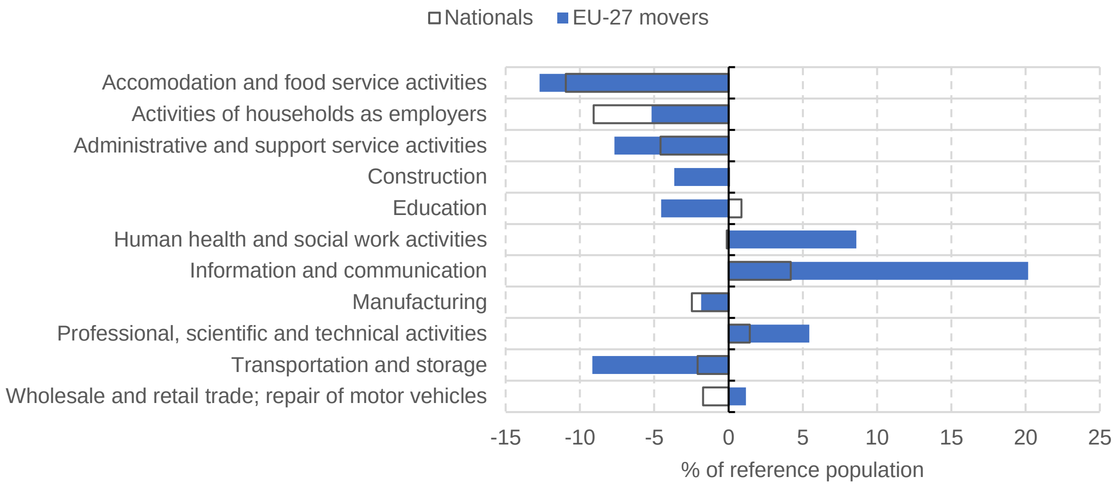
The different timings of the pandemic's progression in different European regions, meant that EU Member States experienced job losses at different times during 2020. Quarterly analysis of employment data shows that employment fluctuated in rhythm with changes in restrictions in nearly all the major destination Member States. Also cross-border work decreased at different times in different states – in Western Europe the decrease generally occurred in the first half of 2020, while in Central Europe it was more pronounced in the second half.

Cross-border recruitment of workers appears to have been severely constricted by the pandemic. Due to restrictions on travel and economic activity, the recruitment of staff from abroad decreased in 2020, while the number of jobseekers increased. This is illustrated by a large drop in the number of job vacancies posted to the EURES job.

Movers in travel and hospitality were hit hard, those in teleworkable sectors fared better

Employment of movers in sectors linked to travel or hospitality decreased during the pandemic. The number of EU movers employed in the transport sector fell by 9 % compared to 2019, and by 13 % in the accommodation and food services sector. In sectors which saw an increased workload during the pandemic, like the health sector, or which were not hit hard by the pandemic (information and communication and professional activities) employment of movers increased.

Figure 5: Annual percentage change in EU movers and nationals aged 20-64 employed by sector, 2019-2020[10]



EU aggregate: EU-27
Germany excluded as destination country.
Source: Eurostat, EU-LFS, specific extractions, Milieu calculations.

While movers were more affected by job losses than nationals, many appear to have found new employment in other sectors. In sectors that experienced job losses, the employment levels of EU-27 movers decreased more than those of nationals (except for activities of households as employers and wholesale and

[10] When including data for Germany, the difference between movers and nationals is generally larger and becomes less favourable for movers in all sectors, with no sectors registering an increase in the number of movers compared to 2019.

retail trade). However, in the sectors where employment increased, movers were the main beneficiaries. The number of movers employed in the health sector increased by 9 % (no change for nationals) and in information and communication by 20 % (versus 4 % for nationals).

Travel restrictions were particularly difficult for highly-mobile workers

Cross-border work decreased during the pandemic. The mobility of EU workers living in one country and employed in another was constrained by a combination of travel restrictions, decreased labour demand, and home-working mandates during the pandemic. This led to a decrease in the numbers of cross-border workers, observed at EU-level in the first half of the year. By the third and fourth quarters, cross-border levels had largely recovered to or exceeded pre-pandemic levels. Overall, decreases appear to have been short-term and closely related to the progression of the pandemic.

Ad hoc public interventions were applied to ensure that there was sufficient labour for some sectors that are dependent on movers. For instance, after initial fears from farmers about a lack of labour supply for harvests, solutions were found by governments to ensure that seasonal workers were able to travel from other parts of the EU. This situation highlighted the dependence of some countries on seasonal workers.

Return mobility of mobile EU citizens

Return mobility is a significant component of labour mobility in Europe

It entails a significant source of inflows in many EU Member States. In 2019, more than 790 000 working age movers returned to their countries of origin[11]. Returnees are a distinct group of movers: living abroad for a few years means they have less of a connection to the domestic labour market of the country of origin than non-mobile nationals but face fewer barriers in terms of language and cultural adaptation than movers overall.

Return mobility has increased throughout the EU since 2016

In the EU-15 returns increased by 21 % or 92 400 and in the EU-13 returns increased by 16 % or 37 500. The highest volumes of return mobility in 2019 are seen in Romania, Germany, France, the UK, Spain, Poland and Italy, while the largest increases compared with 2016 are found in Italy (+84 %), Germany (+53 %) and Spain (+40 %).

Movers with university education are more likely to return. 47 % of the returnees in 2019 had tertiary education in the form of undergraduate or postgraduate degrees, compared to 34 % among movers overall. Since 2016, this has been the largest individual category in the years 2017-2019. In 2016, the groups of returnees with medium and higher education are similar (at 45 % and 44 %, respectively).

[11] While the discussion in the chapter on return mobility is mainly concerned with return mobility within the European Union, it is not possible to identify the previous country of residence in the data. Statistics presented in this chapter therefore include returnees from both EU Member States and third countries.

Returnees are generally young and do not have children

50 % of the returnees are 20-34 years old, with the highest levels in Cyprus (72 %) and the lowest in Slovakia (30 %). Two-thirds of the returnees live in childless households.

Men are more likely to engage in return mobility than women. Men make up a larger proportion of returnees in all but five EU Member States, with the highest proportion in Germany (65 %) and the lowest in the Czech Republic (43 %). The EU-28 average in 2019 is 55 %. This is higher than the proportion of men among movers more generally (51 %), indicating they are more likely to return than female movers.

At least in the short term, returnees have lower employment rates than non-mobile nationals and movers overall. Nearly two thirds (64 %) of returnees were employed a year after returning to their home Member States in 2019. This compares to 74 % for non-mobile nationals, and 78 % for movers still resident in other Member States. Explanations for this can be found in returnees lacking social or professional networks in their home Member State, and in local labour markets being unable to match their skills with suitable employment (skills mismatching). Older people, women, and workers early in their career are particularly vulnerable to skills mismatches.

Policy action to encourage return mobility

Dedicated public schemes and programmes can encourage increased levels of return mobility. Such initiatives can entail targeted coaching or guidance, assistance with reintegrating into the labour market, and financial incentives in the form of tax breaks, research funding, or business start-up capital. Activities which seek to assist movers in reintegrating into the labour market and finding employment appear to be most effective in meeting the needs of returnees. Overall, for programmes to be effective, socioeconomic circumstances regarding e.g. pay, work conditions and quality of life must also be favourable.

KE-CB-22-001-EN-N

Publications Office
of the European Union