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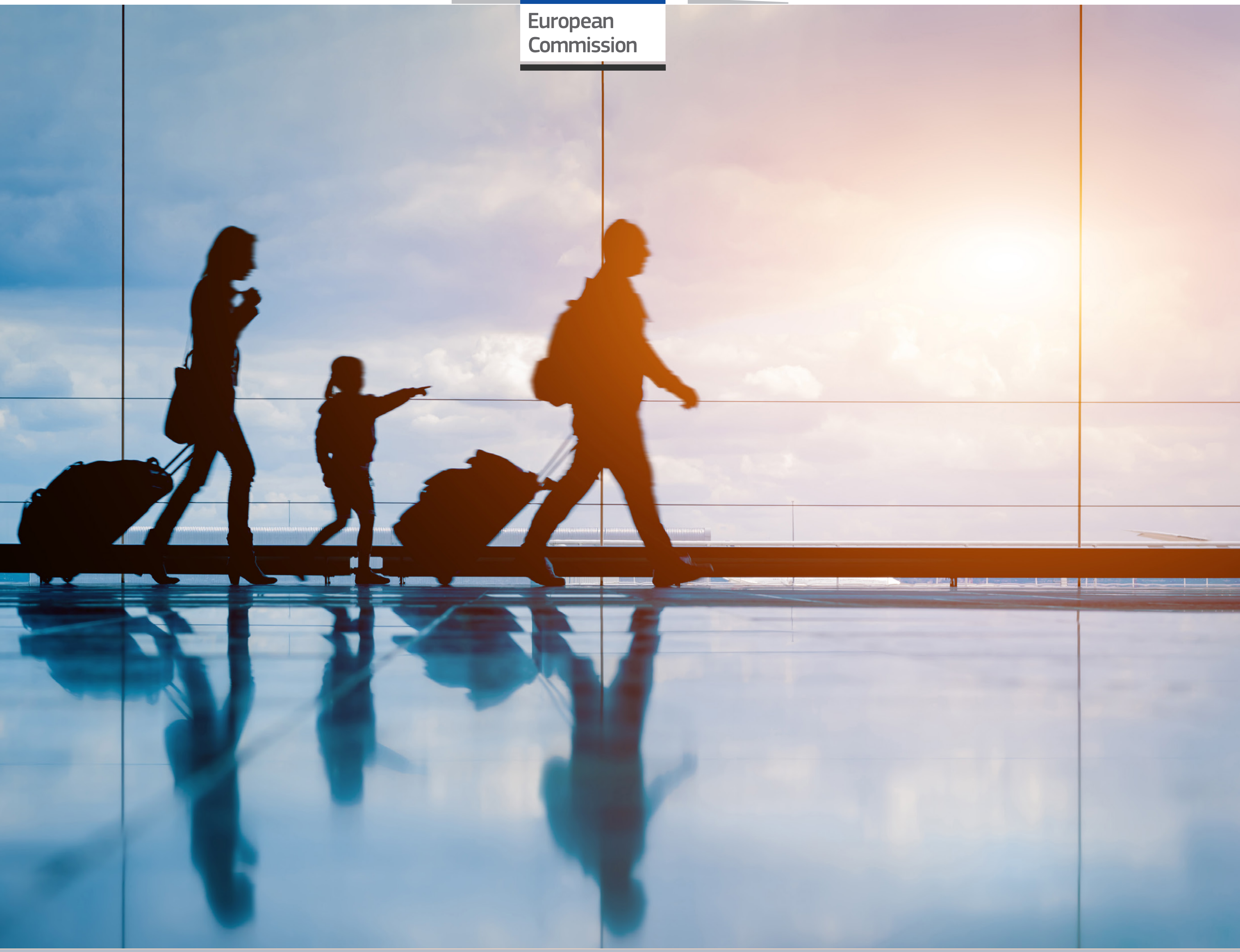

Intra-EU Labour Mobility at a glance

Main findings of the Annual Report on Intra-EU Labour Mobility 2020

Social Europe

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INTRA-EU LABOUR MOBILITY

IN 2019

4.2% OF THE TOTAL LABOUR FORCE**

17.9 mil. EU MOVERS*

9.9 mil. ACTIVE MOVERS**

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

In 2019, over 50% of all movers of working age came from **Romania**, **Poland**, **Italy**, **Portugal and Bulgaria.**

EU-28 ACTIVE MOVERS

Annual growth in stocks of movers continues to be smaller than in the years 2012-2016.

26% Of all EU movers of working age reside in **Germany**, 20% in the **UK**, 28% in **Spain**, **Italy** or **France**.

FOR EVERY 3 PERSONS WHO LEAVE, 2 OTHERS RETURN

In **2018** the share of those who returned was **65%**.

In 2019, **1 out of 3** EU-28 movers was high-skilled, while in 2008, it was **1 out of 4.**

78%

EMPLOYMENT RATE

Those who moved are more likely to be employed than those who did not.

1.5 mil.

CROSS-BORDER WORKERS

Manufacturing continues to be the main sector of employment for EU-28 movers.

Approximately **1 in 5** movers work as a **professional** (highest skill-level), but **1 in 5** also work in **elementary occupations** (lowest skill-level).

Persons are most likely to move at the beginning of their careers.
Among those who strongly intend to move, **75%** are **below 35 years** old.

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 countries[1].**

The analysis covers the mobility of all working age EU citizens (20-64 years) as well as the **mobility of the EU citizens in this age group who are active** (employed and unemployed)[2]. The report also looks at indicators of economic integration of mobile citizens, such as employment and 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 most recent data available is used, mainly from 2019 and in some cases 2018.

This document **summarises the most relevant figures of labour mobility** from the **2020 Report on intra-EU labour mobility.** In line with the two specific chapters of this year's Report, it also contains findings on the **"mobility of high-skilled workers"** and on **"mobility and demographic change". The impact of the COVID-19 pandemic on labour mobility is not reflected in this report**, since the data sources are from 2019/2018.

As the United Kingdom was a Member State of the European Union during the reporting period, it is still included in the annual analysis. In addition, **for key indicators, the values for EU-27 are also provided**.

Intra-EU mobility still rising, but at moderate pace

In 2019 **intra-EU mobility continued to grow but at a slower pace than in the previous years**.

Composition of intra-EU mobility, 2019

Type of mobility	2019 EU-28	2018 EU-28	EU-28 change 2018/19	2019 from EU-28 to EU-27	2019 from EU-27 to EU-27
1. Long-term movers according to Eurostat demography statistics					
▪ **all ages**	17.9 million	17.5 million	1.8%	14.2 million	13.2 million
▪ **working age** (20-64 years)	13 million	12.9 million	1.2%	10.4 million	na
▪ working age movers as share of total working-age population	4.3%	4.2%	0.1pps	3.9%	

[1] https://ec.europa.eu/social/main.jsp?catId=1282&langId=en
[2] If not specifically mentioned as excluded the 2019/2018 figures also include UK movers

Type of mobility	2019 EU-28	2018 EU-28	EU-28 change 2018/19	2019 from EU-28 to EU-27	2019 from EU-27 to EU-27
2. Long-term movers according to EU-LFS					
▪ **working age** (20-64 years)	11.9 million	11.6 million	2.4%	9.3 million	8.9 million
▪ …of which **active movers** (employed or looking for work)	9.9 million	9.6 million	2.9%	7.6 million	7.3 million
▪ active movers as share of total labour force	4.2%	4.1%	0.1pps	3.7%	3.6%
3. Cross-border workers (20-64 years)	1.5 million	1.5 million	-0.6%	1.4 million	1.3 million
(as share of total employed EU-28 citizens in the EU-28)	0.6%	0.7%	-0.1	0.7%	
4. Number of postings (of employed and self-employed), all ages (no. of PDs A1)	4.6 million	3 million	1.6 million	na	na
…equals approximate number of persons	3.06 million	1.9 million	1.16 million	na	na
5. Annual return mobility (20-64 years)[3]	738 000	723 000	2.1%	677 506	na
(as ratio to EU-28 nationals leaving their country of origin in the same year)	65%	72%	-7pps	66%	na

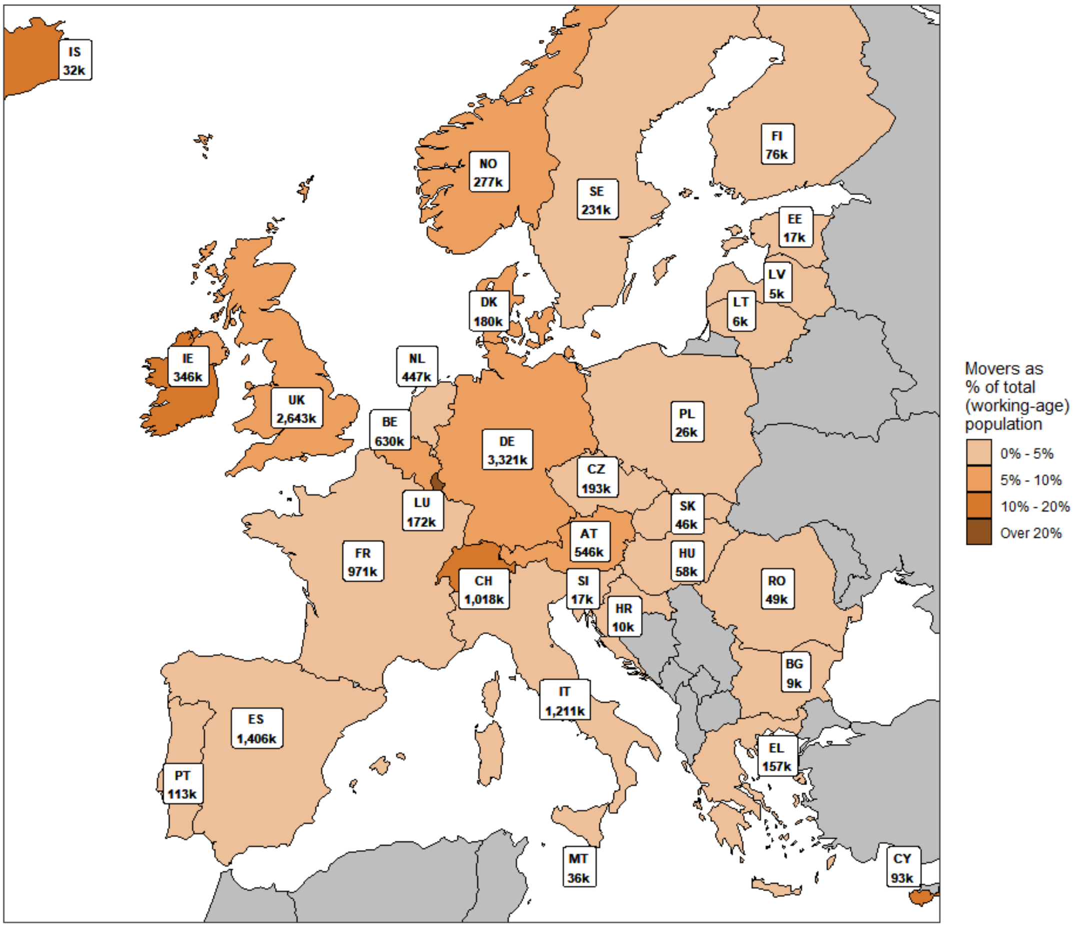
Mobility of EU citizens up by 1.2%

In 2019, there were **17.9 million EU-28 movers in the EU**, out of which **13 million EU movers of working age** (20-64 years), according to **Eurostat population statistics**.

The stock of EU movers of working-age grew by 1.2% in 2018 - 2019, which is **substantially less than the 3.4% in 2017 - 2018.**

[3] Latest data available on flows is from 2018

EU-28 movers in EU-28 and EFTA countries in absolute numbers (1 000s) and as percentage of the total working-age population, 2019

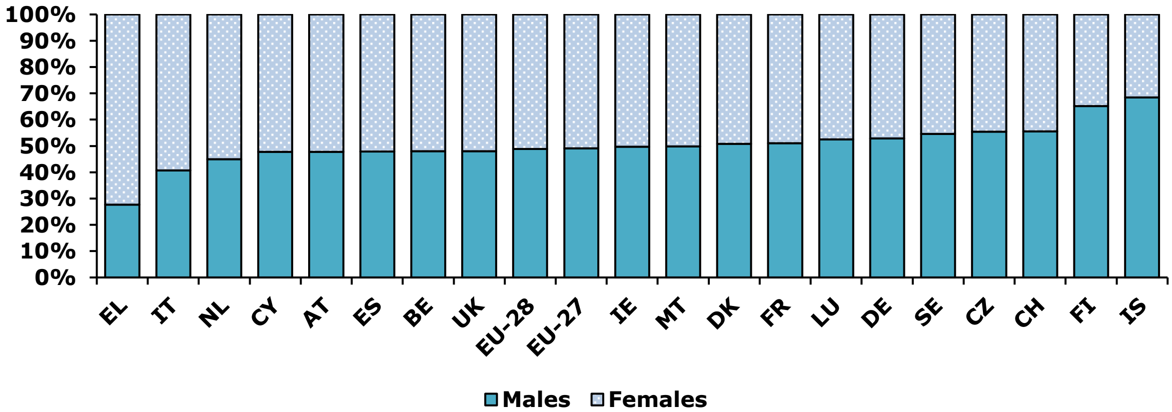


SOURCE: EUROSTAT DATA ON POPULATION BY CITIZENSHIP AND AGE GROUP [MIGR_POP1CTZ] (EXTRACTED MAY 2020), MILIEU CALCULATIONS.

The distribution of women and men among EU-28 movers remained at **51% women and 49% men,** as in the previous two years.

The largest proportions of female movers are found in Greece (72%) and Italy (59%), while males constitute the majority in Finland (65%), Sweden, and Czechia (55% for both).

Gender distribution of working age EU-28 movers, by country of destination (EU and EFTA), 2019



Source: EU-LFS 2019, special extractions provided by EUROSTAT, Milieu calculations.

Germany, Spain, Italy and France: countries of residence for more than half of EU movers

Just under **half of EU working age EU movers (46%) reside in Germany and the UK**, and a further **28% in France, Italy and Spain**. Germany has 3.3 million EU resident movers, Spain - 1.4 million, Italy - 1.2 million, France – 970 000 and the UK - 2.6 million.

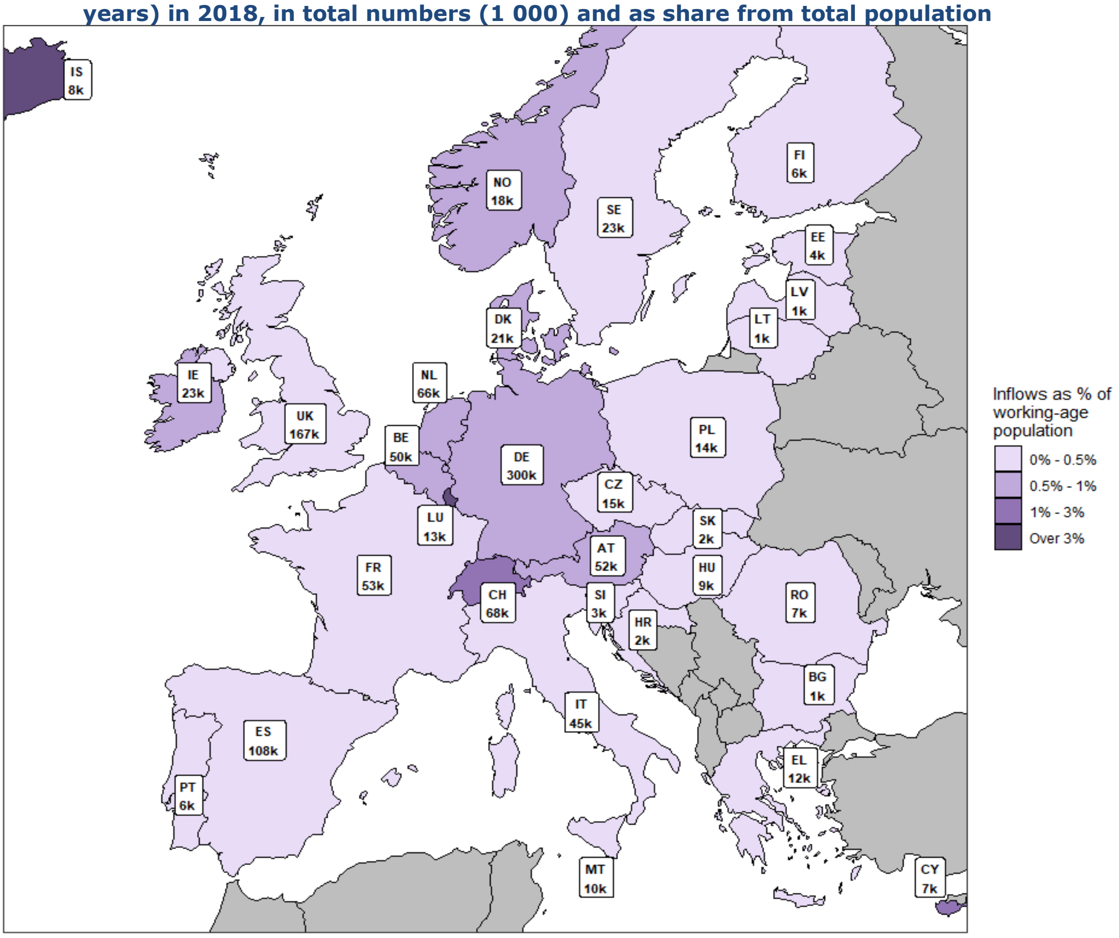
Luxembourg is the country with the **highest proportion of EU-28 movers relative to its population (43.6%)**, followed by Cyprus (17.1%) and Ireland, Austria, Belgium and Malta (all around or just above 10%).

The inflow of EU-28 movers to other Member States (those moving to a Member State which is not their country of origin) remained similar to previous years, **at 1.02 million/year**. In absolute terms, however, **inflows of EU-28 movers have steadily decreased by 8% since 2015 from 1.11 million**.

Germany remains one of the main destination countries for EU movers, with inflows of 299 800 people in 2018 – with a 6% decrease on 2017. EU-27 inflows to the UK continued to decrease strongly (-14%). A decrease is also observed in Italy (-7%), while increases are registered for France (3%) and Spain (4%).

Net mobility of EU-28 movers remained relatively steady, decreasing approximately by 1% from 382 000 in 2017 to 379 000 in 2018. This means that slightly more movers left their country of destination – compared to the inflows – than before, either moving home or yet to another country.

Distribution of inflows to EU-28/EFTA Member States of nationals of another EU-28 country (20-64 years) in 2018, in total numbers (1 000) and as share from total population



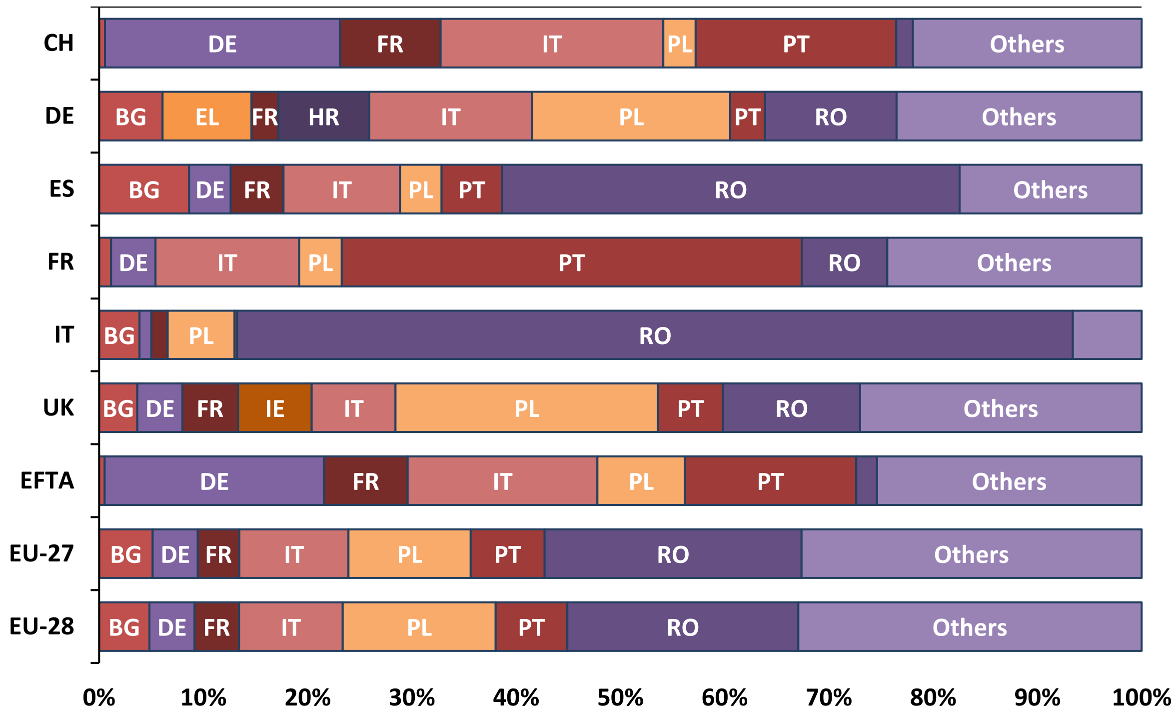
THE COUNTRY LABELS DISPLAY THE COUNTRY AND THE ABSOLUTE INFLOWS IN 2018 (EXPRESSED IN THOUSANDS). COUNTRIES ARE COLOURED ACCORDING TO HOW LARGE THE INFLOWS ARE IN RELATION TO THE TOTAL POPULATION IN THE COUNTRY.
SOURCE: EUROSTAT DATA ON IMMIGRATION BY AGE GROUP, SEX AND CITIZENSHIP [MIGR_IMM1CTZ] (EXTRACTED MAY 2020), MILIEU CALCULATIONS.

Romania, Poland, Italy, Portugal and Bulgaria: countries of origin for more than half of the EU movers

In 2019, over 50% of EU movers were **Romanian, Polish, Italian, Portuguese or Bulgarian** citizens. Together they accounted for **6.9 million** out of 11.9 million movers of working age.

Looking at the 930 000 persons who moved in 2017 – 2018, the countries that **saw most nationals leave** were Romania (163 000), Germany (161 000), UK (110 000), Poland (106 000) and Italy (89 000). Of these, Romania and Poland's outflows decreased most compared to 2017 (-6% and -17%, respectively). Both countries already saw declining outflows in 2017 compared to 2016, and the further decline in 2018 is another indicator for the overall slow-down in growth of mobility.

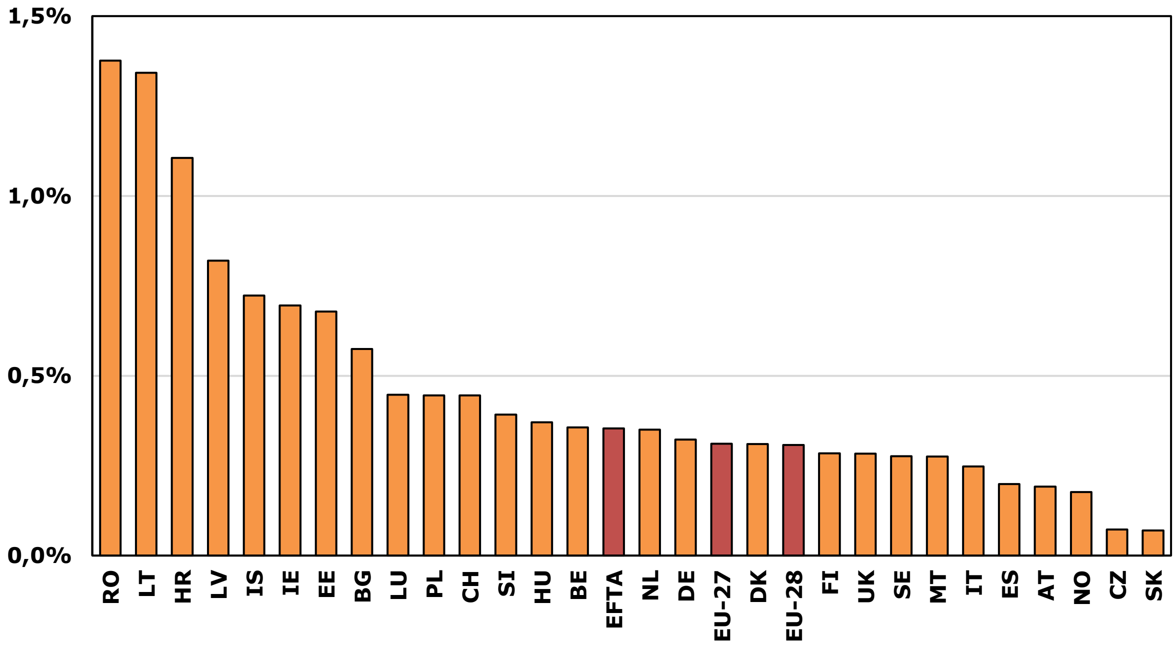
Breakdown by citizenship of EU-28 movers (20-64 years) in EU-28, EFTA and in the top six countries of residence, 2019



SOURCE: EU-LFS 2019, SPECIAL EXTRACTIONS PROVIDED BY EUROSTAT, MILIEU CALCULATIONS.

The annual outflow rate for EU-28 citizens was at 0.3%, meaning that 3 out of 1 000 working age citizens left their country of citizenship in 2018. However, outflow rates ranged from less than 0.1% in Slovakia and Czechia to 1.4% in Romania and 1.3% in Lithuania.

Outflow rate of nationals as a percentage of the population in their country of origin, by country of citizenship, 2018



SOURCE: EUROSTAT DATA ON EMIGRATION BY AGE GROUP, SEX AND CITIZENSHIP [MIGR_EMI1CTZ] (EXTRACTED MAY 2020), AND DATA ON POPULATION ON 1 JANUARY BY AGE GROUP, SEX AND CITIZENSHIP [MIGR_POP1CTZ] (EXTRACTED MAY 2020), MILIEU CALCULATIONS.

Net intra-EU mobility combines the flows of EU-28 and EFTA movers and nationals, so it shows flows of EU citizens in general[4]. Germany, although also being an important country of origin, still has the largest absolute net incoming mobility, followed by the Netherlands and Spain. Spain has evolved from being a net sending country (in 2014) to become a net destination country (in 2017).

For the UK and Italy, despite their importance as destination countries, large outflows of nationals mean that their net mobility is either very low (UK) or negative (Italy). Note that the UK saw a strong decrease in net mobility since 2015, when it had the second largest net mobility after Germany. Poland and Romania are unsurprisingly net sending countries (together with Italy).

Return mobility: for every three persons who leave, two return

The total number of returnees in 2018 was around 738 000, up 2.1% from the previous year, and continuing a pattern of **annual proportional increases since 2011**.

In Romania (83%), Lithuania (56%) and Bulgaria (52%) return mobility accounted for more than 50% of total inflows.

The share of those who returned compared to those who left in 2018 is 65%, **meaning that for every three persons who leave, two return**.

[4] However, it also includes the movement of EU citizens to and from third countries.

Net mobility for nationals remained negative[5] in most EU countries with the only exceptions in 2018 being Malta, Hungary, Denmark, Estonia and Ireland.

Return mobility (inflows of nationals), 20-64 years, 2009-2018 (thousands)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
EU-28										
Total	627.7	607.3	596.1	642.8	617.3	640.9	622.7	663.5	722.6	738.5
Annual Δ		-3.3%	-1.8%	7.8%	-4.0%	3.8%	-2.8%	6.6%	8.9%	2.2%
EU-13										
Total	266.7	236.2	239.0	292.0	268.4	265.1	228.5	240.3	267.8	256.6
Annual Δ		-11.4%	1.2%	22.1%	-8.1%	-1.3%	-13.8%	5.2%	11.5%	-4.2%
EU-15										
Total	361.0	371.1	357.0	350.8	348.8	375.9	394.2	423.2	454.7	481.8
Annual Δ		2.8%	-3.8%	-1.7%	-0.6%	7.7%	4.9%	7.4%	7.4%	6.0%

SOURCE: EUROSTAT DATA ON IMMIGRATION BY AGE GROUP, SEX AND CITIZENSHIP [MIGR_IMM1CTZ] (EXTRACTED MAY 2020), MILIEU CALCULATIONS.

UK withdrawal from the EU has an impact on the figures on intra-EU labour mobility

One event that will affect the shape and nature of intra-EU labour mobility in the near future is that the freedom of movement of workers between the UK and the EU-27 will cease on 31 December 2020. **The rights of the EU 27 citizens who already live and work in UK and those UK citizens who live and work in EU 27 will be further protected**, in line with the provisions of the Withdrawal Agreement.

However, **mobility to the UK has steadily decreased since the vote to leave the EU in 2016**, even with free movement still in place.

For the time being the UK is still a major destination country for EU-mobile workers. With 2.6 million mobile EU-27 workers, 1.2 million of them high-skilled, the **UK is still the country which ranges second in terms of welcoming mobile EU workers**.

[5] More nationals leave their country of origin than return to it.

Labour market integration of EU mobile workers further improves

The European Union **Labour Force Survey** indicates a figure of **11.97 million EU movers of working age**, out of which **9.9 million active movers** in 2019 - an increase of 3% from 2018.

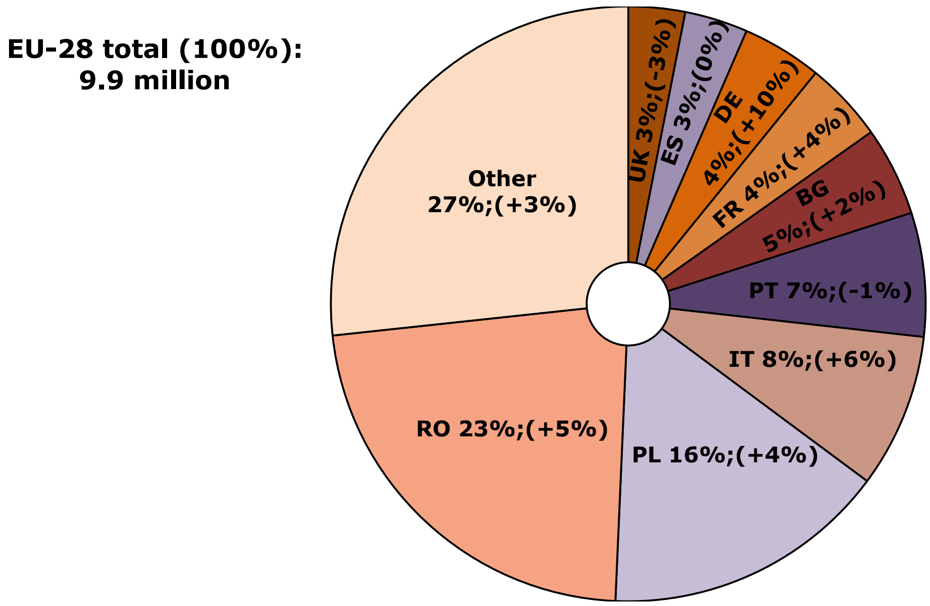
The active movers represent 4.2% of the total labour force in the EU-28 Member States.

The **main countries of residence of active movers** were the **same as those of all movers**, namely, Germany and the UK, with just over 2 million each, Spain and Italy, with around 1 million each, and France, with around 600 000 active EU-28 movers. These five Member States hosted close to 80% of active movers in 2019.

The Netherlands (8.8%), Spain (7.7%) and Austria (5.3%) saw significant growth in stocks of active movers for the period 2018 - 2019.

Romania and Poland remained the **most important countries of origin of active EU-28 movers, together accounting for 39%**.

Most common countries of origin of working age EU-28 active movers, 2019

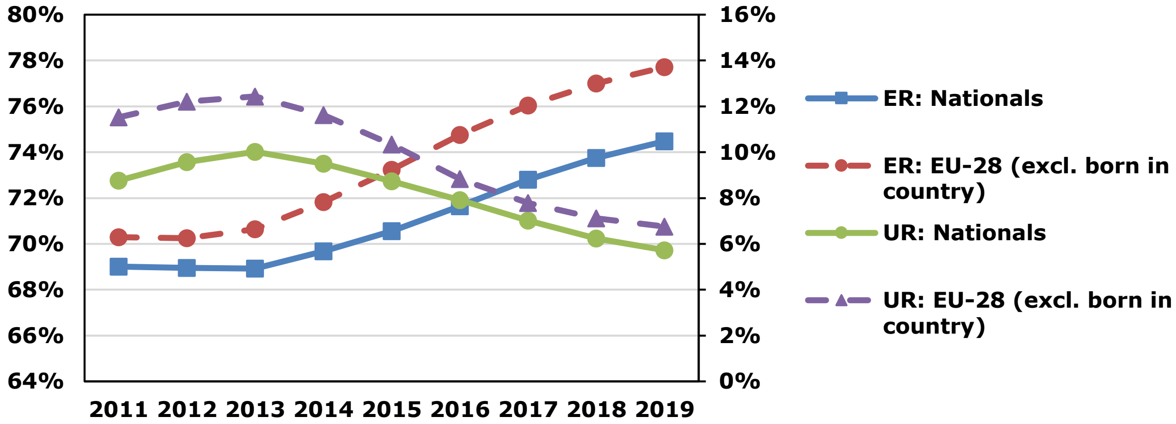


FIRST NUMBER: SHARE FROM ALL ACTIVE MOVERS IN 2019; SECOND NUMBER: PERCENTAGE CHANGE FROM 2018)
SOURCE: EU-LFS 2019, SPECIFIC EXTRACTIONS PROVIDED BY EUROSTAT, MILIEU CALCULATIONS.

EU movers are more likely to be employed than local citizens. In 2019, the employment rate of EU-movers was 78%, compared to **75% for nationals**.

However, **EU-28 movers also had a slightly higher unemployment rate (7%) than nationals (6%).** The gap was particularly large in Italy (EU-28 movers: 14%; nationals: 9%) where unemployment among EU-28 movers was the second highest EU-wide. It was by far the highest in Greece, both among EU-28 movers (25%) and nationals (17%).

Trend in employment (ER) and unemployment rates (UR) for EU-28 movers and nationals, 2011-2019

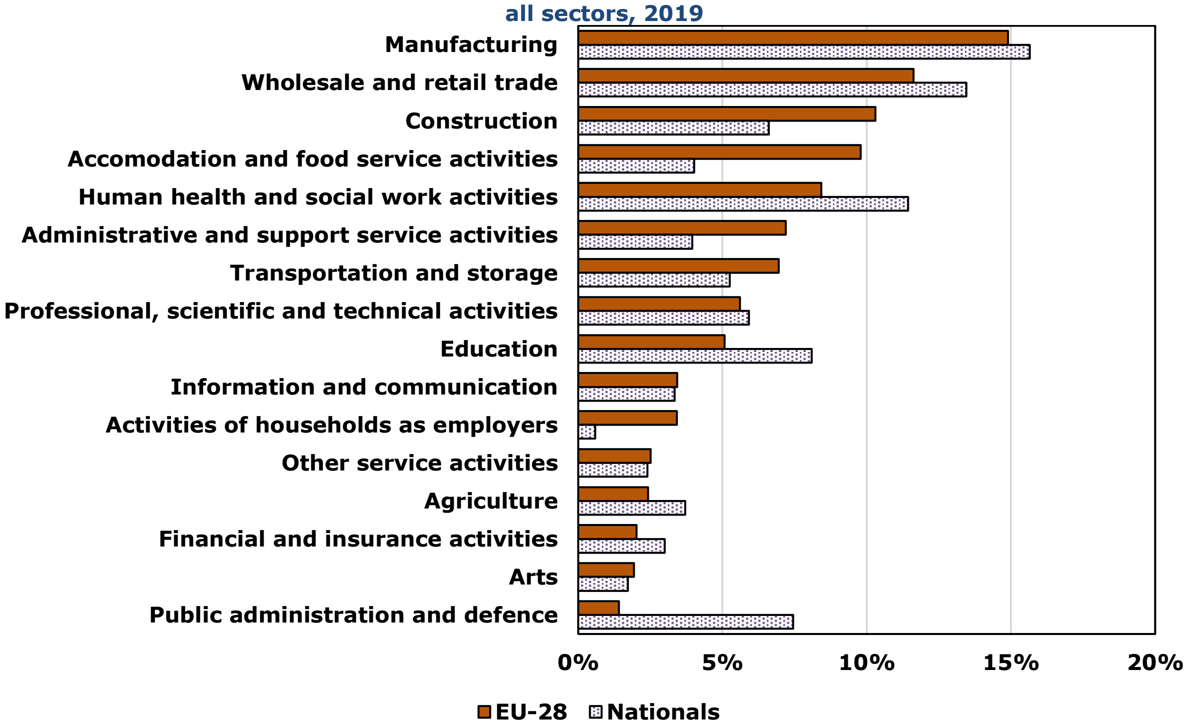


SOURCE: EU-LFS 2019, SPECIFIC EXTRACTIONS PROVIDED BY EUROSTAT, MILIEU CALCULATIONS.

The main sectors of economic activity for EU-movers in 2019 were manufacturing and wholesale and retail trade, employing 15% and 12% of EU-28 movers, respectively, and 16% and 13% of nationals. Among EU-28 movers, manufacturing has retained that position since 2008.

Sectors that, over the past 10 years, have seen the most changes in employment of EU-28 movers are construction and activities of households as employers – both decreased in importance, although construction remains the third largest sector, employing 10% of movers. Transport and storage continuously increased in importance since 2012 and in 2019 employed 7% of movers.

Sectors of activity among EU-28 movers and nationals (20-64 years), EU-28 aggregate, as shares of all sectors, 2019



SOURCE: EU-LFS 2019, SPECIFIC EXTRACTIONS PROVIDED BY EUROSTAT, MILIEU CALCULATIONS.

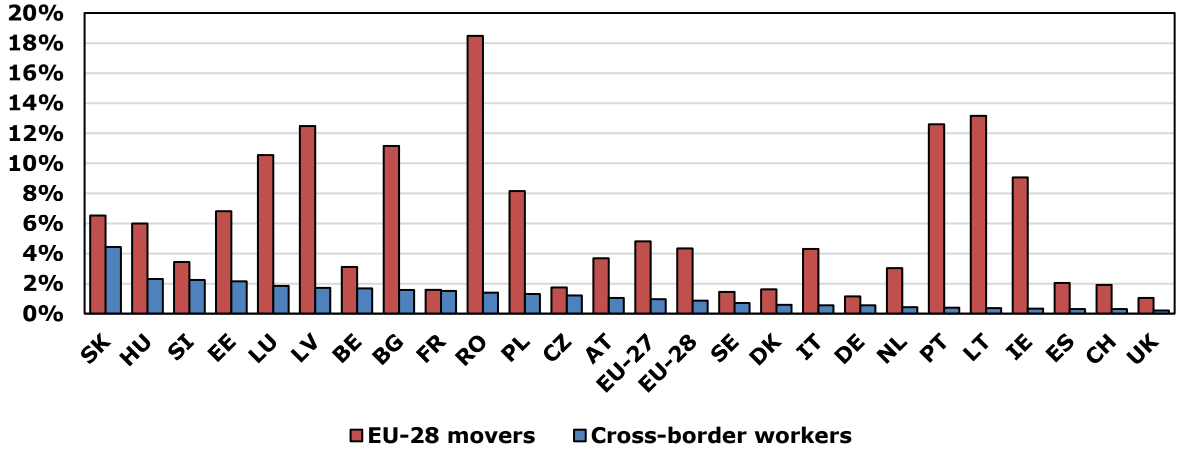
TOTALS EXCLUDE MOVERS BORN IN THEIR COUNTRY OF RESIDENCE.

Slightly less cross-border workers in 2019 than in 2018

The number of cross-border workers in EU and EFTA countries increased by 0.9% between 2018 and 2019 and reached 1.89 million. Nevertheless, the cross-border mobility between EU-28 countries - 1.5 million in 2018 - decreased by 0.6% between 2018 and 2019.

The decrease was slightly larger in the EU-27, with 0.8% fewer than in 2018. This was **largely due to a decrease of 3% in cross-border workers working in Germany, the largest country of work.**

(National) Cross-border workers and EU-28 movers as % of all employed nationals, by country of origin, 2019



SOURCE: EU-LFS 2019, SPECIFIC EXTRACTIONS PROVIDED BY EUROSTAT, MILIEU

The **main countries of residence** of cross-border workers working either in another EU Member State or an EFTA country were: France (398 000), Germany (234 000) and Poland (222 000).

The main **countries of work** were Germany (396 000) and Switzerland (381 000), Luxembourg (190 000), Austria (177 000) and the Netherlands (116 000).

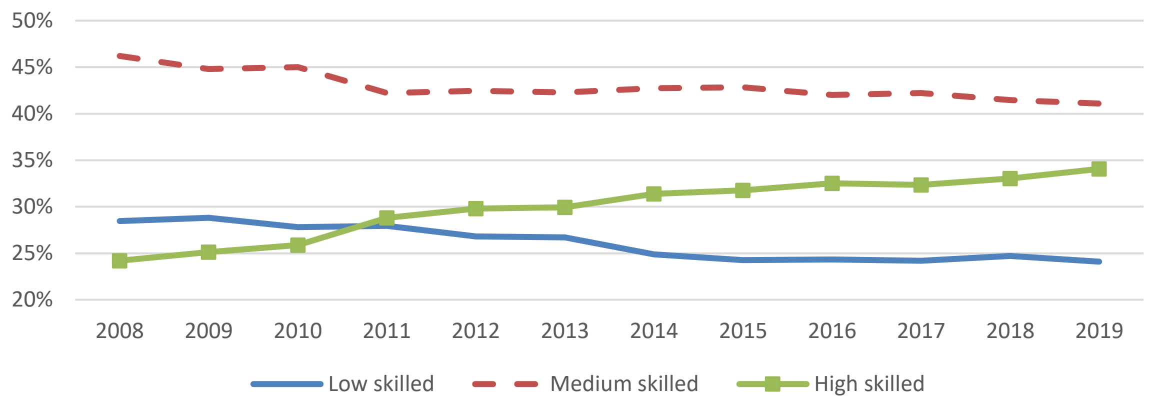
Increased mobility of high-skilled workers

The **share of highly educated movers increased by 4 percentage points** between 2011 and 2019, so that by now more than a third of the movers are highly educated, whereas the share of low educated decreased by 4 percentage points, to below a quarter of all movers. Medium educated movers remained the largest group with more than 40% of all movers.

The share of movers with a high education level increased in most destination Member States for which reliable data are available, except Germany and Portugal. Italy remained the country with substantially the lowest share of highly educated movers, who make up only 13%. Portugal had the EU's highest share of low-educated movers (37%).

Mobility of high-skilled persons is associated with the circulation of knowledge and contributes to the EU's objective of the development of the knowledge-based economy.

Proportion of EU-28 movers, by skill level, 2008-2019 (%)



SOURCE: EU-LFS 2019, SPECIFIC EXTRACTIONS PROVIDED BY EUROSTAT, MILIEU CALCULATIONS

The **most important EU destination countries for high-skilled movers are Germany, Spain, France, Belgium and Austria**. Major sending countries are Poland, Romania and Italy but also Bulgaria and Portugal.

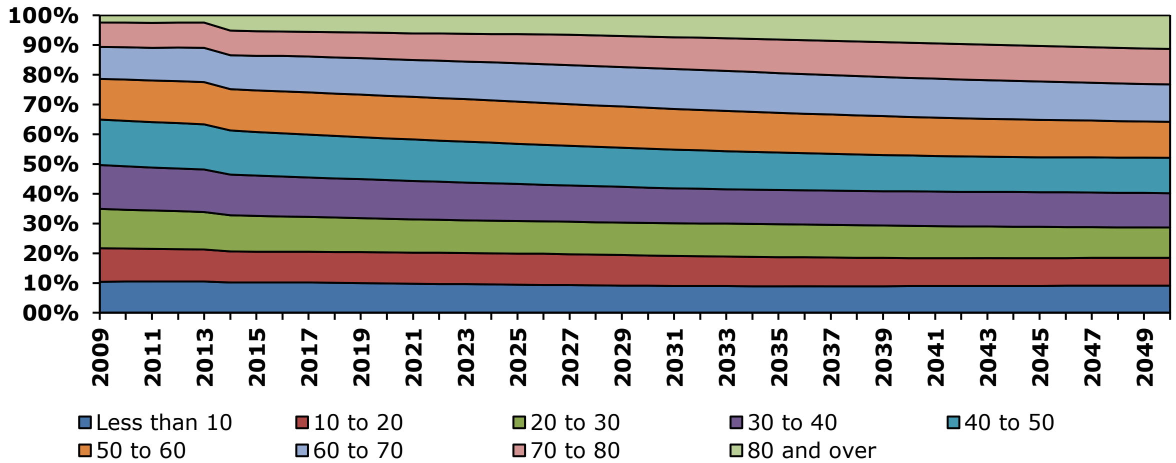
High-skilled movers work most commonly as professionals, such as in business and administration, science and engineering or teaching. However, overqualification appears to be quite prevalent, with around a third (34%) working in an occupation that requires a lower skill level than that of their qualifications. At EU-28 level, in 2019, 55% of high-skilled movers were women.

Research suggests that **return of high-skilled movers to their country of origin contributes to economic development and growth**, and many sending countries have developed policies aimed at incentivising return of their high-skilled movers.

Demography: a challenge for labour mobility

According to demographic projections from both Eurostat and IIASA, **the average age of EU citizens will increase**. All age groups below 60 see a decrease in their size as a proportion of the whole population, especially those between 20 and 39 years. Older age groups see large proportional increases.

Demographic structure, by age group, using historic (2018 and earlier) and projected (2019 and forward) data, EU-27, groups expressed as % of total population, 2010-2050.



BOTH HISTORIC AND PROJECTED POPULATIONS INCLUDE TCNS. AS EUROSTAT PROJECTIONS CANNOT BE FILTERED BY CITIZENSHIP, THESE ARE ALSO INCLUDED IN PRE-2019 DATA TO FACILITATE COMPARISON.

SOURCE: EUROSTAT (EXTRACTED JUNE 2020), MILIEU CALCULATIONS.

Persons are most likely to move at the beginning of their careers, and the likelihood of moving decreases with age. Throughout the past decade, in all major sending countries, people aged 20 to 29 and 30 to 39 have had higher annual outflow rates than other age groups. Among those who strongly intend to move, 75% are below 35 years old.

With the younger population also declining in sending countries, this could imply **a decrease in mobility flows**. However, population ageing may have effects on important drivers on EU mobility, such as adverse effects on economic convergence, increased demand in the healthcare sector and for a female workforce, which may counteract this decrease in mobility flows.

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