Annual Report on Intra-EU Labour Mobility 2021

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Country codes[1]

AT	Austria	**EE**	Estonia	**IS**	Iceland	**PL**	Poland
BE	Belgium	**EL**	Greece	**IT**	Italy	**PT**	Portugal
BG	Bulgaria	**ES**	Spain	**LT**	Lithuania	**RO**	Romania
CH	Switzerland	**FI**	Finland	**LU**	Luxembourg	**SE**	Sweden
CY	Cyprus	**FR**	France	**LV**	Latvia	**SI**	Slovenia
CZ	Czechia	**HR**	Croatia	**MT**	Malta	**SK**	Slovakia
DE	Germany	**HU**	Hungary	**NL**	Netherlands	**UK**	United Kingdom
DK	Denmark	**IE**	Ireland	**NO**	Norway		

Abbreviations and acronyms

AFMP	Agreement on the Free Movement of Persons[2] (see box below for definition)
EEA	European Economic Area; it consists of the Member States of the European Union and three countries of the European Free Trade Association (all except Switzerland).
EFTA	European Free Trade Association (Switzerland, Iceland, Liechtenstein and Norway). Only Switzerland, Iceland and Norway are included in this report, as data for Liechtenstein are not available from the EU Labour Force Survey (EU-LFS)
EU	European Union (refers to the composition at the time the respective text passage refers to; i.e. to EU-28 until 31.01.2020 and EU-27 after that).
EU-13	Countries that joined the EU between 2004 and 2013 – Bulgaria, Cyprus, Croatia, Czechia, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia, Slovenia
EU-14	Countries that joined before 2004 – Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden but not the UK
EU-27	EU Member States as from 1 February 2020 (i.e. excluding the UK)
EU-28	EU Member States until 31 January 2020
EU-LFS	EU Labour Force Survey – see Eurostat website and Annex A.2 of this report for more detail
EURES	European Employment Services is a European cooperation network composed of public employment services, other employment services, trade unions and employers' organisations. Its objective is to facilitate the free movement of workers within the European Economic Area and Switzerland. Workers and jobseekers can look for a job and employers can advertise vacancies on the EURES portal. Furthermore, the EURES website provides information on 'living and working' in all participating countries.

[1] This report lists countries in alphabetical order of their codes, as per the EU's interinstitutional style guide section 7.1, except when, for reasons of clarity, they are arranged by data size.

[2] Agreement between the European Community and its Member States, of the one part, and the Swiss Confederation, of the other, on the free movement of persons, 22002A0430(01), Official Journal L 114, 30/04/2002 P. 0006-0072.

IPS	International Passenger Survey of the UK Office for National Statistics
ONS	Office for National Statistics in the UK
PES	Public Employment Service
pps	Percentage points: the difference between two percentages (e.g. two employment rates) is calculated in pps
PPS	Purchasing Power Standard
TCNs	Third-country nationals: residents of EU and EFTA countries who are neither EU nor EFTA citizens
TFEU	Treaty on the Functioning of the European Union

Definitions

Length of stay	Years that movers have resided in the current country of residence.
Active	Unless mentioned otherwise, based on definition used in the EU-LFS: the group of 'employed' includes persons who did any work (one hour or more) for pay or profit during the reference week, and those who had a job or business but were temporarily absent. The group of 'unemployed' includes those who were not working during the reference week, but who had found a job starting within three months, or who are actively seeking employment and are available to work[3].
Agreement on the free movement of persons (AFMP)	Bilateral Agreement between the EU and Switzerland that grants the citizens of Switzerland and the EU the right to freely choose their place of employment and residence within the national territories of the contracting parties. The Agreement was signed in 1999 and entered into force in 2002. It was subsequently extended to the Member States that joined the EU after 2002[4].
Circular mobility	Circular mobility is exercised by a person repeatedly changing residence between two or more countries (e.g. moving from Portugal to Belgium and back to Portugal – or Spain or any other MS). – Short-term mobile workers, such as seasonal workers, who do not take residence at the place of work, are not considered as circular mobility. This definition is also used by the European Migration Network.
Country of citizenship	The country of which a person holds citizenship
Country of origin	The terms 'country of origin' and 'country of citizenship' are used interchangeably throughout the report unless stated otherwise.
Country of residence	The country in which a person habitually resides. According to Regulation (EC) No 862/2007 on Community statistics on migration and international protection, 'usual residence' means the place at which a person normally spends the daily period of rest (…) or, by default, the place of legal or registered residence. In this report, persons are counted as residents of a certain country if they have resided there for at least 12 months or intend to do so. This is in line with measurement, as the EU-LFS[5]

[3] Eurostat 'EU-LFS database user guide. Version November 2016', p. 55; description of variables WSTATOR and SEEKWORK.

[4] Swiss Confederation (*Schweizerische Eidgenossenschaft*), 'Free movement of persons', available at: https://www.eda.admin.ch/dea/en/home/bilaterale-abkommen/ueberblick/bilaterale-abkommen-1/personenfreizuegigkeit.html.

[5] See EU-LFS Explanatory Notes, p. 4, available at: http://ec.europa.eu/EUROSTAT/documents/1978984/6037342/EU-LFS-explanatory-notes-from-2014-onwards.pdf

	and the Eurostat migration statistics only capture persons who stay, or intend to stay, in a country for one year or more
Cross-border worker	For the purposes of this study, cross-border workers are defined as EU or EFTA citizens who live in one EU or EFTA country and work in another, either as employees or self-employed. Cross-border workers therefore move across borders more or less regularly[6]. Cross-border workers may include the legally defined groups of seasonal[7] and frontier workers[8] and may also include some posted workers (Regulation 883/2004)[9]. However, the data include all persons who live in one country and work in another. To align with the other parts of the study, data presented here look only at cross-border workers of EU or EFTA nationality. They can be EU-27/EFTA movers – meaning they live in a different Member State than their country of citizenship – and cross-border workers at the same time (e.g. where a French person lives in Belgium and works in Luxembourg)[10].
Eastern European countries	Bulgaria, Czechia, Croatia, Hungary, Poland, Romania, Slovakia, Slovenia (definition created for the purposes of this study)
Employed	Any person engaged in an activity to produce goods or provide services for pay or profit (International Labour Organization (ILO) definition). Operationally, the concept is measured through specific surveys such as the EU-LFS. In the EU-LFS, a person is defined as employed if, in a reference week, they worked for at least one hour or had a job or business but were temporarily absent. The concept includes dependent and self-employed workers.
Employment rate	The percentage of employed persons, over the total population in the same reference group
EU/EFTA movers	EU or EFTA citizens who reside in an EU or EFTA country other than their country of citizenship (definition created for the purposes of the study). The analysis in Section 2 (Mobility of workers) focuses on EU/EFTA movers who were also born outside their current country of residence
Foreigner	Any person who is not a citizen of the country in which they reside. This term is used here to refer to both EU/EFTA movers and TCNs
Inflows	The total number of persons who establish their usual residence[11] in the reference year in a given country for a period expected to be at least 12 months, having previously resided in a different country[12]
Inflow rate	The percentage of inflows of a certain group of people over the population in the same reference group residing in the country of destination[13]

6 The frequency of commuting cannot be identified in the EU-LFS, which is the data source for the estimation of numbers of cross-border workers.

7 Seasonal workers are defined in Regulation (EEC) No 1408/71 on the application of social security schemes to employed persons and their families moving within the Community (Article 1(c)), while they are no longer defined under the currently applicable rules in Regulation (EC) No 883/2004. They enjoy the right to free movement according to Regulation (EU) No 492/2011 and equal treatment with nationals, according to Directive (EU) No 2014/54. For more details on the definition, see Section 2.2.3 of the 2016 Annual Report on intra-EU Labour Mobility.

8 Frontier workers are defined as cross-border workers who return to their country of residence 'as a rule daily or at least once a week', according to Regulation (EC) No 883/2004 (Article 1(f)). They have the right to equal treatment with nationals, according to Directive (EU) No 2014/54. For more details on the definition, see Section 2.2.3 of the 2016 Annual Report on intra-EU Labour Mobility.

9 Further explanations on the legislative framework can be found in the specific report on posting: De Wispelaere, F., De Smedt, L. and Pacolet, J., Posting of workers. Report on A1 portable documents issued in 2018, Network Statistics FMSSFE, European Commission, Brussels, 2019.

10 For a more detailed definition, see European Commission, *Mobility in Europe*, 2011, p. 86.

11 According to Regulation (EC) No 862/2007 on Community statistics on migration and international protection, 'usual residence' means the place at which a person normally spends the daily period of rest (…) or, by default, the place of legal or registered residence.

12 Article 2(1)(c) of Regulation (EC) No 862/2007 defining 'immigration'. This Regulation is the basis for the collection of Eurostat migration data, which are mainly used in this report to calculate immigration rates.

13 Inflow rates of EU-28 movers are calculated as inflows of nationals over the total number of nationals residing in the country; total inflow rates are calculated as all inflows over the total population residing in the country.

Inactive	Any person who is neither employed or unemployed according to the ILO definition (see above and below); this group of inactive typically includes people in retirement or early retirement, pupils/students/people in training, homemakers, those in compulsory military service, those with permanent disabilities. For a more precise statistical definition, see the EU-LFS User Guide on the ILOSTAT variable, p. 55[14])
Mobile worker	Active EU citizen who resides in a Member State or EFTA country other than their country of citizenship
Mobility	EU or EFTA citizens moving their habitual residence to another Member State/EFTA country other than their country of citizenship and/or working in a different Member State/EFTA country to that where they reside (cross-border workers)
Mover	See EU/EFTA mover
National	Any person holding citizenship and living in the reported country of residence
Net intra-EU mobility	Net intra-EU mobility is the difference between inflows and outflows of nationals, EU and EFTA movers from/into a certain EU Member State. It is calculated as the subtraction of outflows from inflows and can be negative (a Member State experiencing higher outflows than inflows) or positive (higher inflows than outflows)
New EU movers	EU movers of working age and with a length of stay of up to two years
Outflows	The total number of persons in the reference year who cease to have their usual residence[15] in a Member State for a period that is, or is expected to be, at least 12 months[16]
Outflow rate	The percentage of outflows of a certain group of people over the population in the same reference group[17] residing in the country of origin[18]
Posted worker	Posted workers for the purpose of this report includes persons covered under Articles 12 and 13 of Regulation (EC) No 883/2004 on the coordination of social security systems. It includes: the persons who are employed by an employer that normally carries out its activities in a Member State and who are posted by that employer to another Member State to perform work on its behalf (Art.12); the persons who normally pursue an activity as a self-employed person in a Member State who go to pursue a similar activity in another Member State (Art.12); and such persons who pursue an activity as an employed/self-employed person in two or more Member States (Art.13)[19]. While the last group are strictly speaking not considered as 'posted workers', in some cases the persons covered by Art.13 might also be posted under the conditions of the Posting of Workers Directive and their numbers are also estimated through PD A1 documents. Therefore, this group is included in the Commission's annual report on posting of workers and in the figure in Table 1 in this report; a separate figure only for the group of persons to which Art. 12 applies is provided in a footnote.
Returnee	A person carrying out return mobility (see below)

[14] This list corresponds to different categories of inactive persons, as differentiated in the EU-LFS for the MAINSTAT variable, see: Eurostat, *EU Labour Force Survey Database User Guide*, 2019a, available at: https://ec.europa.eu/EUROSTAT/documents/1978984/6037342/EULFS-Database-UserGuide.pdf

[15] According to Regulation (EC) No 862/2007 on Community statistics on migration and international protection, 'usual residence' means the place at which a person normally spends the daily period of rest (…) or, by default, the place of legal or registered residence.

[16] Article 2(1)(c) of Regulation (EC) No 862/2007 defining 'emigration'. This Regulation is the basis for the collection of Eurostat migration data, which are mainly used in this report to calculate emigration rates.

[17] Outflow rates of nationals are calculated as outflows of nationals over the total number of nationals residing in the country; total outflow rates are calculated as all outflows over the total population residing in the country.

[18] ibid.

[19] For further information on the legislative background, see De Wispelaere et al. (2019).

Return mobility	Return mobility is defined in this report as the movement of EU citizens to their country of citizenship for a long-term period (at least one year) after a long-term stay abroad (at least one year).
Self-employed	In this report, the number of self-employed nationals and EU movers is measured with data from the EU-LFS. Here, self-employed are defined as persons who work in their own business, professional practice or farm for the purpose of earning a profit and who employ other persons or not[20].
Stock	Refers to the number of a certain group of persons (e.g. EU-27 movers) on a given date in a defined geographical area, as indicated by official statistics.
Unemployed	Any person who is not currently employed but who is available for work within two weeks and is actively seeking work (ILO definition)
Unemployment rate	The share of unemployed from all active (unemployed plus employed) persons in a given reference population
Western European countries	EU-14 countries - Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden, the UK
Working age	People aged between 20 and 64 years

[20] Eurostat, EU-LFS Explanatory notes from 2016 onward, p. 29, available at: https://ec.europa.eu/EUROSTAT/documents/1978984/6037342/EU-LFS-explanatory-notes-from-2016-onwards.pdf

Executive summary

Introduction

The annual report 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) as well as the mobility of the EU citizens in this age group who are active (employed and unemployed). Each annual report also covers special topics associated with intra-EU labour mobility, according to current developments and policy needs.

This 2021 edition focuses on intra-EU professional mobility in the context of the COVID-19 pandemic, on the one hand, and, on the other, the return mobility of mobile European citizens. In addition, recent developments in intra-EU mobility are examined throughout the report, such as the withdrawal of the UK from the EU in early 2020. Chapter 1 analyses trends in the mobility of EU citizens in EU and EFTA countries while Chapter 2 focuses on socio-economic characteristics of EU mobile workers. Chapter 3 analyses the most recent developments of intra-EU mobility in light of the COVID-19 pandemic. Chapter 4 examines the return mobility of EU mobile citizens.

The two main data sources used are Eurostat population (including international migration) statistics and the European Labour Force Survey (EU-LFS), collected until September 2021. Where necessary, the coherence between these two sources as well as their comparability over time to measure trends in intra-EU mobility are discussed in the report.

Main findings

Mobility of EU citizens

Overall trend. Overall, the number of EU working age citizens living in another EU and EFTA Member State than their country of citizenship (hereafter 'EU movers') had increased by a small margin at the beginning of 2020 compared to 2019. 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, they made up a significantly larger proportion of the working-age population in EFTA countries at 15.1 %.

Countries of destination. Germany hosts around one-third of EU movers, while Spain, Italy and France together host another one-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, and hence overtakes France as a destination country for EU movers.

The number of movers increased in all examined countries but three compared to 2019, but generally at a lower rate than in previous years. In France and Italy, stocks decreased by less than 1 %. Greece experienced a significant annual 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.

Countries of origin. The composition of EU movers by citizenship has remained broadly the same since 2015, with Romanians remaining the largest individual group. In 2020, one-fifth of EU movers were Romanian, followed by Italian and Polish (11 % each), Portuguese (7 %), Croatian and Bulgarian (5 % each).

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 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

Overall trend. For the first time since 2012, the labour force survey reports that the number of active EU movers decreased in 2020. 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 and is mainly due to decreasing numbers of Romanian and Polish movers, which are down 170 000 and 117 000 compared to 2019.

Performance of EU movers on the labour market. 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 service, 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.

EU movers remained overrepresented compared to nationals in lowest-skilled occupations but were similarly represented in the highest-skilled occupations such as legislators, senior officials and managers. 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.

The number of workers residing in one EU/EFTA Member State and working in another (cross-border workers) decreased slightly in 2020. Compared to 2019, there was a decrease of 3 % to 1.3 million. 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.

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 %.

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.

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.

COVID-19 and intra-EU labour mobility

Overall developments. The COVID-19 pandemic has reduced labour mobility in the European Union 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 places 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. This is also illustrated by the fact that 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.

Sectoral changes. Employment of movers in sectors linked to travel or hospitality decreased during the pandemic. Across the European Union, restrictions on travel and on public gatherings led to lay-offs in many sectors. 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.

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 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).

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[21]. 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.

Overall trend. Since 2016, return mobility has increased more for the EU-15 countries than EU-13. EU-15 returns increased by 21 % or 92 400, while 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).

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

[21] 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.

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.

Introduction

Aim of the report

This report presents general information on intra-EU mobility, together with information on occupational structure, age structure and employment rates of active movers based on harmonised and comparable statistics. Thus it delivers on Article 29 of Regulation (EU) 2016/589[22], namely to monitor and make public labour mobility flows and patterns in the Union. Next to the general overview of developments in the past year, it dedicates specific attention to topical issues.

Specific topics addressed in previous Annual Reports include:

- Mobility of high-skilled workers; impact of demographic change (2020).
- Mobility spells – analysis of length of stays abroad of EU movers (2019).
- Qualifications of EU-28 movers; household composition of EU-28 movers (2018).
- The gender dimension of mobility; language and other obstacles and drivers of mobility; mobility of health professionals (2017).
- Mobility of pensioners; return mobility (2016).
- Cross-border workers (2015).
- Mobility of young and highly educated people (2014).

Structure of the report

The report is structured as follows. Chapter 1 of this report focuses on total numbers of resident EU movers on 1 January 2020 and annual flows of EU movers in the EU/EFTA countries in 2019 and looks at how these have developed compared to mobility in the past. The focus lies on the analysis of intra-EU mobility in the current 27 Member States. Nevertheless, as the reporting concerns (in parts) a period where the UK was still an EU Member State (2019), this report includes numbers on mobility within the EU-27 and the EU-28 Member States, where possible. A separate subsection presents an overview of mobility between the EU-27 countries and the UK in recent years.

Chapter 2 focuses on active movers (i.e. mobile workers), defined as employed persons and jobseekers born outside their current country of residence[23]. It is based on the EU-LFS for which the latest data is available for 2020 (annual averages), thus already reflecting impacts of the COVID-19 crisis and Brexit. It provides figures on stocks in 2020 and recent developments, examines the characteristics of these workers (labour status, education

[22] The Commission and the Member States shall monitor and make public labour mobility flows and patterns in the Union on the basis of reports by the European Labour Authority, using Eurostat statistics and available national data' (Article 29, Regulation (EU) 2016/589 of the European Parliament and of the Council of 13 April only 2016 on a European network of employment services (EURES), workers' access to mobility services and the further integration of labour markets, and amending Regulations (EU) No 492/2011 and (EU) No 1296/2013).

[23] This allows the use of EU-LFS data. Movers born in the country of residence constitute a small share in most countries and only 5 % across the EU-28. However, their share is higher in several countries, namely Germany (12 %), Switzerland (11 %), Belgium (14 %) and Luxembourg (6 %).

structure, occupations, sectors, overqualification) and compares them to nationals in the countries of destination and origin. It also identifies similarities and differences between the gender groups.

Chapter 3 looks at how the COVID-19 crisis has impacted intra-EU mobility. It first discusses the context, namely political and economic developments since the onset of the pandemic and potential impacts on mobile workers. Then, it provides an overview of how mobility of different groups of movers developed in 2020 compared to the years before and discusses if and to what extent the situation during the pandemic may have contributed to those changes.

Chapter 4 analyses return mobility within the EU, with a focus on what happened since 2016, when a special chapter on this topic was last prepared. Similar to the other sections, it first provides a description of trends of return mobility and of different groups of returning movers. It also examines the potential effect of Brexit on return mobility, before discussing further potential explanatory factors for the trends presented earlier. The section closes with an overview of different types of return programs or initiatives put into place by the Member States.

Legal background: EU applicable rules and recent developments

The principle of free movement of workers is enshrined in Article 45 of the Treaty on the Functioning of the European Union (TFEU). Until 1993, the Treaty rules on free movement of persons applied only to economically active persons (i.e. employed persons and jobseekers)[24]. In 1993, the Maastricht Treaty gave new life to the EU rules on free movement of persons, enshrining the Article 20 right of EU citizenship, while Article 21 gave all EU citizens and their family members the right (in principle) to move and reside freely within the EU. These provisions must be viewed in the context of the general principle of non-discrimination based on nationality enshrined in Article 18 of the TFEU and in Article 21(2) of the Charter of Fundamental Rights of the European Union.

Secondary legislation set out more detailed rules to regulate free movement, through Directive (EC) No 2004/38 on the right of citizens of the Union and their family members to move and reside freely within the territory of the Member States[25]. The Directive codified previous legislation that dealt separately with distinct categories of EU citizens. The specific rights concerning free movement of workers and their family members are provided in Regulation (EU) No 492/2011 (replacing Regulation (EC) No 1612/68). Accordingly, all Union citizens and their family members have the right to move and reside freely within the territory of the Member States[26]. Inactive EU citizens have the right to reside in another Member State for more than three months if they have sufficient resources and comprehensive sickness insurance cover[27]. Directive (EU) No 2014/54 on measures facilitating the exercise of rights conferred on workers in the context of freedom of movement for workers aims to ensure more effective and uniform application of the right to free movement and provides specific rules for effective enforcement.

[24] Regulation (EU) No 492/2011 of the European Parliament and of the Council of 5 April 2011 on freedom of movement for workers within the Union.

[25] Directive (EC) No 2004/38 of the European Parliament and of the Council of 29 April 2004 on the right of citizens of the Union and their family members to move and reside freely within the territory of the Member States, OJ L 158, 30.4.2004, pp. 77–123.

[26] ibid.

[27] Juravle et al., A fact-finding analysis of the impact on the Member States' social security systems of the entitlements of non-active intra-EU migrants to special non-contributory cash benefits and healthcare granted on the basis of residence, European Commission, Brussels, 2013, p.1.

The free movement of persons also applies to countries that are part of EFTA[28], as a result of the Agreement creating the European Economic Area (EEA) and the Agreement on the Free Movement of Persons (AFMP) with the Swiss Federation[29].

Recent developments in labour mobility:

On 31 January 2020, **the United Kingdom left the European Union**. For the remainder of 2020, a transition period ensured a continuation of existing conditions for freedom of movement. On 30 December 2020 the EU and the UK signed the EU-UK Trade and Cooperation Agreement, which was provisionally applied from 1 January 2021 and officially came into force on 1 May 2021. EU citizens living in the UK prior to 31 December 2020 had the opportunity to apply for 'settled status', enabling them to maintain the same rights as they had whilst the UK was still a member of the EU. Similar schemes were put in place by EU Member States for British citizens living in EU Member States prior to 31 December 2020. EU citizens who were not already living in the UK prior to this date and who wish to live and work in the UK must now comply with a points-based immigration system. British citizens who wish to work in the EU must now apply for work permits in most EU Member States.

During the **COVID-19 pandemic** Member States brought in a series of restrictions on movement in order to reduce the spread of the virus. This included introducing border checks restricting movement between Member States, including within the Schengen Zone. These measures and the effect that they had on intra-EU labour mobility are described in detail in Chapter 3, which is dedicated to the impacts of the pandemic.

Methodological notes

Changes in survey methodology have led to a break in German data in 2020. From 2020 on, the EU Labour Force Survey (EU-LFS) has been integrated into the newly designed German microcensus as a subsample. Furthermore, there were technical changes in the sampling method, survey management and data collection. These technical changes and the impact of the COVID-19 crisis led to low response rates and a biased sample for 2020 data. Estimates for 2020 can therefore not be compared directly with those of previous years[30]. The bias becomes larger the more disaggregated the data becomes. **Therefore, in the case of comparisons between 2019 and 2020 for disaggregated data, Germany is excluded from the analysis.**

Quarterly data from the EU-LFS was not available for Germany for 2020, therefore it was not possible to include Germany as a destination country in the quarterly analysis undertaken in Chapter 3.

To account for these changes in this report, the following steps were taken:

- Where the EU aggregates from 2020 are compared to 2019, the change was controlled by using EU-26 aggregates (excluding the German data);

[28] EFTA countries included in this report are Iceland, Norway and Switzerland. Liechtenstein was excluded as no data are available from the EU-LFS.

[29] Decision (EC) No 94/1 and Decision (EC) No 2002/309. Additional protocols were signed to extend the agreement to 'new' Member States in 2006 and 2009: Council Decision (EC) No 2006/245 and No 2009/392.

[30] For further explanations, see Eurostat 'Publication note on German EU-LFS in 2020', available at: https://ec.europa.eu/eurostat/documents/1978984/6037342/German+note+for+EU+LFS+data+2020.pdf/c223fa3c-1271-2977-6965-9654bea23f8f?t=1618238557179

- For most indicators that refer to an annual change based on LFS data, figures for EU-27 and EU-26 aggregates are presented;

- where the difference was considerable or EU-27 aggregates seemed unreliable otherwise (especially for the more disaggregated data in section 2.2), reference is made to EU-26 aggregates.

Given the break in series in the German LFS data in 2020, national employment statistics from Germany were also analysed. This data is not directly comparable to the LFS data, due to different concepts of 'employed' and 'unemployed'. According to data from the federal employment agency, the number of **employed movers**[31] in Germany was 2.5 million. The number grew by 1 % or 23 000 persons in 2020 which is much less than in the three preceding years when numbers grew by between 120 000 and 180 000 annually. Still, it is an increase, whereas the EU-LFS data suggests a decrease in numbers of employed movers of over 200 000[32].

Overview of key indicators

Different forms of **labour mobility** may be identified:

Long-term labour mobility, where persons move their residence to a country of which they are not a citizen, *for at least one year*[33], to seek or take up work; this concept of long-term mobility must be distinguished from the legal term 'permanent residence', meaning the right to permanently reside in a country after a residence of at least five years[34]. Developments in the long-term mobility of all movers, those of working age, and active movers (or workers) are presented in Table 1, under points 1 and 2, which compares data from two sources – Eurostat population statistics and the EU Labour Force Survey (EU-LFS). However, these two sources are not fully comparable[35]. First, population statistics cover the whole population while EU-LFS often only cover the population in private households and, therefore, exclude collective households. Second, the rules for defining the usual resident population used in EU-LFS and population statistics differ. Finally, the reference period for compiling EU-LFS and population statistics is not the same. While the EU-LFS statistics usually refer to the average quarterly or annual statistics, population statistics generally refer to specific dates instead of periods, such as January 1 or mid-year population level and characteristics. Therefore, and due to the different methods applied, figures may diverge. This divergence is striking in Table 1 since long-term labour mobility slowly increased from 2019 to 2020 according to Eurostat population statistics while it slightly decreased according to the EU-LFS. These opposite trends suggest that long-term labour mobility remained relatively steady during that period or flattened during 2020 after an increase in 2019.

Short-term mobility, where someone moves to another country for less than one year, is extremely difficult to assess, as there is no European-level data source. However, short-

[31] Source: Bundesagentur für Arbeit, Table: *Beschäftigte nach Staatsangehörigkeiten (Quartalszahlen),* available at: https://statistik.arbeitsagentur.de/SiteGlobals/Forms/Suche/Einzelheftsuche_Formular.html?nn=1523064&topic_f=beschaeftigung-eu-heft-eu-heft. Numbers refer to EU-28 movers including UK citizens. However, their share in Germany is minor (around 2 %).

[32] The employment agency's data excludes self-employed movers, while the LFS data on 'employed' includes them (they make up around 10 %). The employment agency's data furthermore shows that among the employed movers, numbers of 'marginally employed' (they make up around 10 % of all employed) decreased in all four quarters of 2020 compared to the same quarter in 2019.

[33] The main EU-wide data sources – the EU-LFS and Eurostat population/migration statistics – count people who live, or intend to live, in a certain country for at least one year.

[34] Directive (EC) No 2004/38.

[35] European Commission (2021), Quality report of the European Union Labour Force Survey 2019 – 2021 edition.

term mobility was in the focus of public interest in the context of the COVID-19 pandemic (see Chapter 3).

Cross-border mobility, where someone resides in one country but is employed or self-employed in another and moves across borders regularly for this purpose; this concept itself houses different definitions (see box 'definitions' at the beginning of this report) and the key trends are presented in Table 1, point 3.

Posting of workers, where a person employed by an employer that normally carries out its activities in one Member State is sent i.e. 'posted' by that employer to another Member State to perform work on its behalf for a limited period. It also includes posted self-employed persons – those who normally pursue an activity as self-employed in a certain Member State and who go to pursue a similar activity in another Member State. The data reported in Table 1 below also include persons who pursue an activity as an employed/self-employed person in two or more Member States[36]. Data on portable documents issued to posted workers is analysed in a separate report[37] and key figures are shown in Table 1, point 4.

Return mobility, where long-term movers return to their country of origin. Due to lack of precise figures, return mobility is approximated from figures on nationals moving to their country of citizenship (see Section 1.2.4).

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[38]	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[39]	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[40] (20-64 years)**	1.5 million	1.6 million	-3 %	1.5 million

[36] See table of definitions for explanation and for further information on the legislative background, 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.

[37] 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.

[38] 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 .

[39] 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.

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

as share of total employed EU-27 citizens in the EU-27[41]	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[42] (of employed and self-employed), all ages (no. of PDs A1) ***	3.7 million[43]	4.5 million	-18.5 %	4.6 million
…equals approximate number of persons (estimated number)[44]	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 %

**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.

41 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.

42 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).

43 …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).

44 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.

1. Mobility of EU citizens

This chapter provides an overview of recent developments on EU mobile citizens. The first section focuses on the stocks of mobile EU citizens living in other EU and EFTA countries than that of their country of citizenship. It examines recent developments in numbers of mobile citizens by country of destination and origin and identifies the principal corridors between EU and EFTA countries. It also identifies the main demographic characteristics of mobile EU citizens. The second section provides a detailed analysis of the flows of EU citizens between EU and EFTA countries. It first analyses the trends in net mobility and return mobility. The last section of this chapter investigates the consequences of Brexit on the mobility of UK and EU citizens.

Key findings

Overall trend

- **The number of EU working age citizens living in another EU and EFTA Member State than their country of citizenship (hereafter 'movers') had increased by a small margin compared to 2019.** 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 %.

Destination countries

- **Germany hosts around one-third of all EU movers, while Spain, Italy and France together host another one-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 host approximately 1 million each. Other than these countries, only Belgium and Austria host more than half a million movers. Including the EFTA countries, Switzerland is a significant destination country, hosting just over 1 million movers, and hence it overtakes France as a destination country for EU movers.

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

- **While inflows are decreasing, Germany still received around three times as many new EU movers in 2019 as the second-largest country, Spain.** In 2019 there were 273 400 EU movers arriving in Germany. Despite a decrease of 8 % compared to 2018, confirming the continuing downward trend since the peak of 2016, this is three times as many as Spain (92 700).

Countries of origin

- **The composition of EU movers by citizenship has remained broadly the same since 2015, with Romanians remaining the largest individual group.** In 2020 one-fifth of EU movers were Romanian, followed by Italian and Polish (11 % each), Portuguese (7 %), Croatian and Bulgarian (5 % each).

- **The number of EU movers returning to their country of origin has increased gradually since 2016.** In 2019, 720 900 citizens returned to their country of origin after a long-term stay abroad (i.e. engaged in return mobility). This is an increase of 6 % (or about 43 000) compared to 2018. In four EU Member States (Hungary, Malta, Denmark and Estonia), more citizens are returning than leaving.

Labour mobility between the European Union and the UK

- **Nearly 600 000 UK movers lived in EU Member States at the beginning of 2020, a level comparable to that of the most recent previous years.** 570 000 UK citizens of working age had their usual residence in EU Member States on 1 January 2020.

- **Although the Brexit process did not lead to a decrease of UK nationals in the European Union in the most recent years, a growing number of them acquired EU citizenship.** 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.

- **Since the Brexit referendum in 2016, a decreasing number of movers from other EU Member States went to the UK, while outflows from the UK rose.** Inflows of movers from other EU Member States decreased by around one-fifth between 2016 and 2019; outflows increased by 27 %. In the meantime, the acquisition of UK nationality by EU citizens climbed significantly since the referendum, from an annual 17 000 in 2016 to 40 000 in 2020, with the highest levels in 2017-2018.

1.1. Main countries of residence and citizenship of EU/EFTA movers

1.1.1. Overall trends in the stock of mobile EU/EFTA citizens

The number of EU-27 citizens of working age living in another EU-27 country on 1 January 2020 had increased by 2 % compared to a year earlier, continuing the upward trend seen in recent years. The stock of EU-27 citizens of working age having their usual residence in EFTA countries also grew by 2 %.

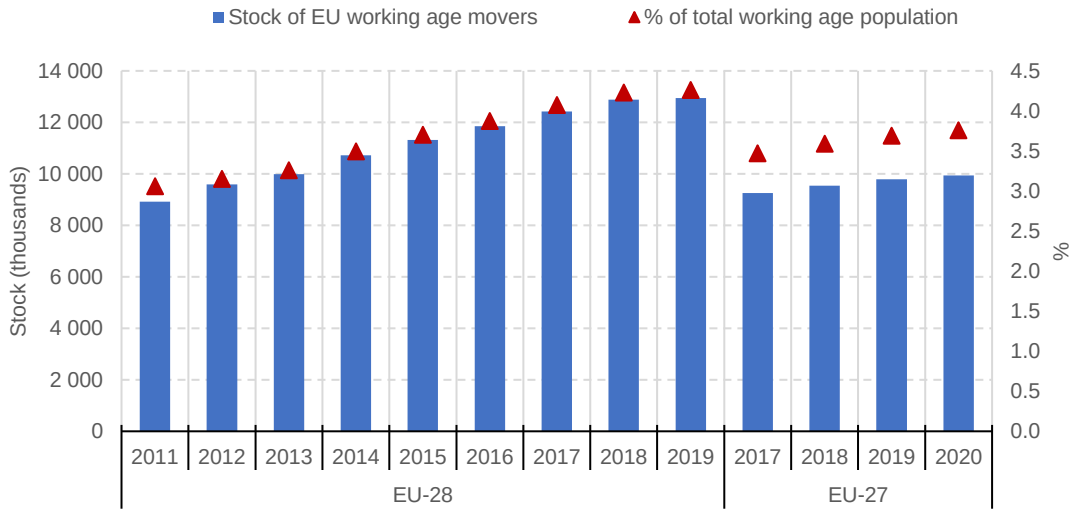
These figures come from 1 January 2020 and therefore do not account for the potential impact of the COVID-19 pandemic. Data from the EU Labour Force Survey (EU-LFS), which take into account the whole of 2020, show a decrease of 2 % in the numbers of EU mobile citizens in 2020 compared to 2019. These differences may suggest that the stock of EU-27 citizens of working age living in another EU-27 country decreased slightly in the pandemic, while already before growth had flattened. Figures from the EU-LFS will be discussed in Chapter 2 and Chapter 3 of this report.

Around 9.9 million EU-27 citizens of working age were living in another EU-27 country on 1 January 2020, representing about 3.8 % of the total working-age population in EU-27 countries. Although this proportion of working age movers was modest, it has nevertheless consistently grown over recent years. 1.3 million EU-27 movers of working age lived in the EFTA countries on 1 January 2020, accounting for 15.1 % of the working-age population in these countries.

The UK left the European Union on 31 January 2020. In view of this, the UK is no longer included as a country of origin and destination for long-term intra-EU labour mobility. Nevertheless, the UK has historically been a major destination country for EU movers and therefore the effects of Brexit on intra-EU mobility are examined. A simple way to approximate the contribution of the UK to the stock of mobile EU citizens of working age throughout the past decade is to examine the trends in the stock of EU-28 citizens of working age living in another EU-28 country during the past years and to compare them to trends excluding the UK during the same years.

The stock of working age EU-28 citizens living in another EU-28 country rose gradually during the past decade, despite a deceleration at the end of the period (Figure 1). It increased from 8.9 million in 2011 to 12.9 million in 2019 (Figure 2). The exclusion of the UK from the statistics on long-term intra-EU mobility leads to a significant drop in the stock of mobile EU workers. Subsequent developments in this chapter show that this drop is mainly attributable to the omission of the UK as a country of destination for mobile EU citizens of working age rather than its omission as a sending country.

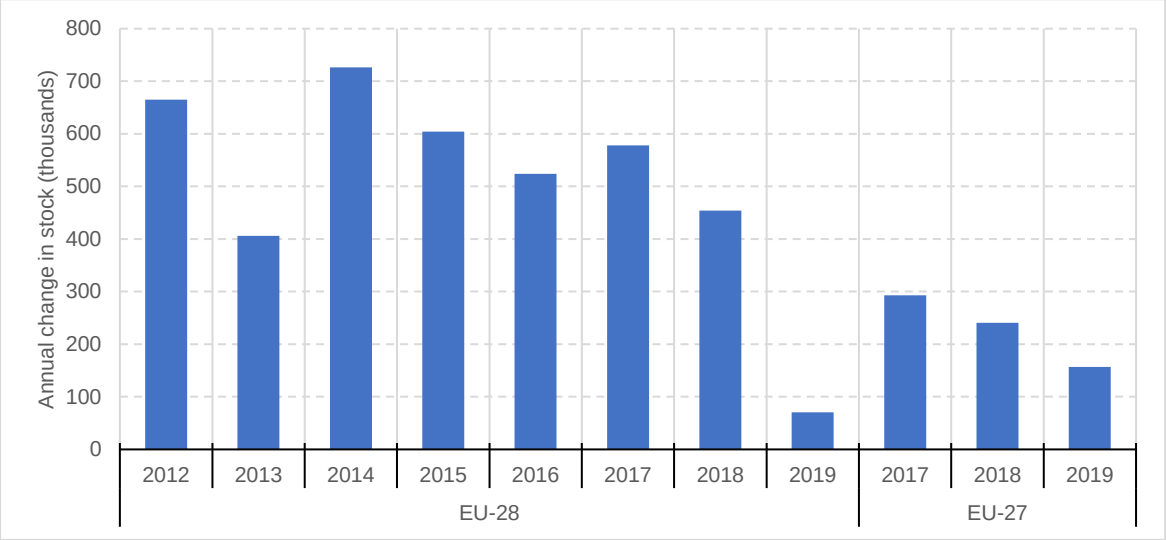
Figure 1: Stocks of EU movers aged 20-64 years in the European Union, 2011-2020



EU aggregates: EU-2018: 2011-2019. EU-27: 2017-2020
Provisional data for PL (2014-2020) and FR (2018-2020). estimated numbers for PL (2016-2020), IE (2019) and RO (2020). breaks in time series for FR (2014) and LU (2017).
Due to lack of reported statistics, numbers on stocks of EU-27 movers are estimated for: 2019 and 2020 CY, FR, HR, EL, MT, PL; 2019 for DE; based on shares of EU-27 movers from EU-28 movers in EU-LFS data.

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

Figure 2: Annual change in stocks of EU movers aged 20-64 years in the European Union, 2012-2020



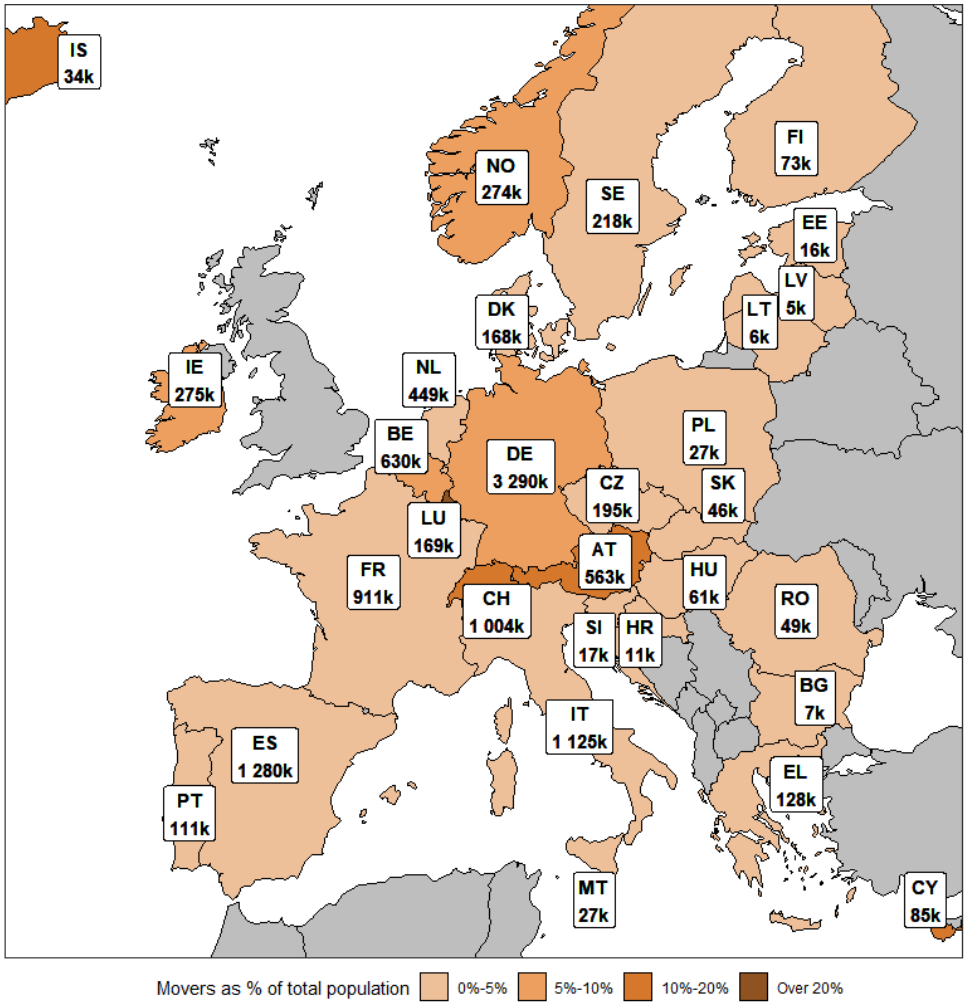
EU aggregates: EU-2018: 2011-2019. EU-27: 2017-2020
Provisional data for PL (2014-2020) and FR (2018-2020). estimated numbers for PL (2016-2020), IE (2019) and RO (2020). breaks in time series for FR (2014) and LU (2017).
Due to lack of reported statistics, numbers on stocks of EU-27 movers are estimated for: 2019 and 2020 CY, FR, HR, EL, MT, PL; 2019 for DE; based on shares of EU-27 movers from EU-28 movers in EU-LFS data.

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

1.1.2. EU mobile workers: countries of destination

On 1 January 2020, Germany was the country of destination welcoming by far the most mobile EU-27 citizens of working age. Of the 9.9 million EU-27 movers of working age living in another EU-27 country, Germany hosts 3.3 million, almost three times as many as any other EU-27 country. Spain, Italy, and France were also important countries of destination for EU mobile citizens. Together, these three Member States account for a further third of mobile citizens (Figure 3).

Figure 3: EU movers aged 20-64 years in EU-27 and EFTA countries (1 000s and % of the total working age population), 2020



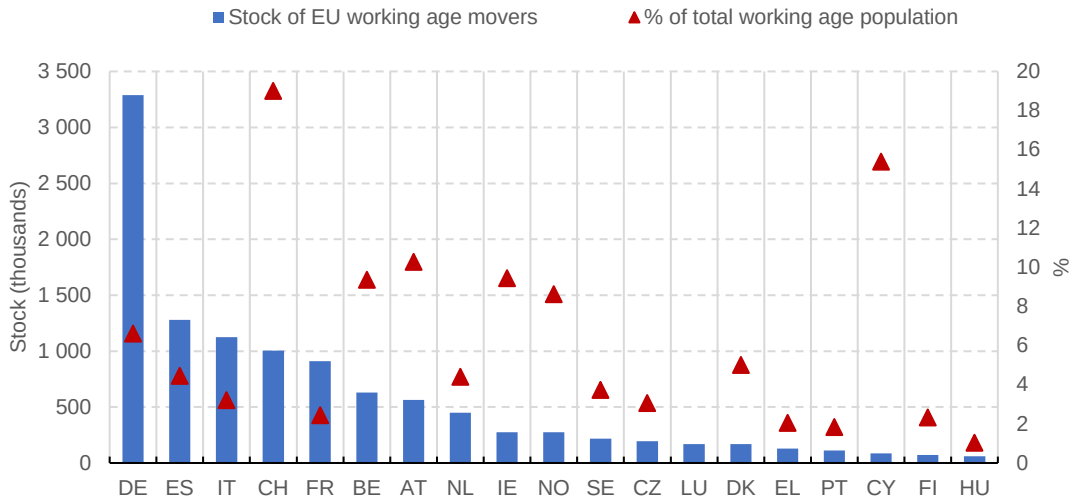
Source: Eurostat, population [migr_pop1ctz], Milieu calculations.

Switzerland hosted over one million EU-27 mobile citizens of working age on 1 January 2020, accounting for more than two thirds of the stock of EU-27 mobile citizens of working age living in EFTA countries. Although Switzerland was less attractive for the citizens than Germany, Italy, and Spain, it nevertheless hosted more mobile EU-27 citizens of working age than France.

Considering the number of working-age EU mobile citizens as a proportion of the total working-age population of the country of destination presents a different picture (Figure 4). For instance, the share of mobile EU-27 citizens of working age was 42 % in Luxembourg, nearly 20 % in Switzerland, and 15 % in Cyprus. It also reached high levels in Belgium,

Austria, Ireland where mobile EU-27 citizens of working age represented more than 10 % of the total corresponding population in these countries. By contrast, this share was generally smaller in more populous EU-27 countries such as France, Italy, Spain or Poland. In these countries the share of working-age EU movers as a proportion of the total. Working-age population was 4 % or less at the beginning of 2020. In Germany it was 7 %.

Figure 4: Stocks of EU movers aged 20-64 years in selected EU/EFTA countries, 2020



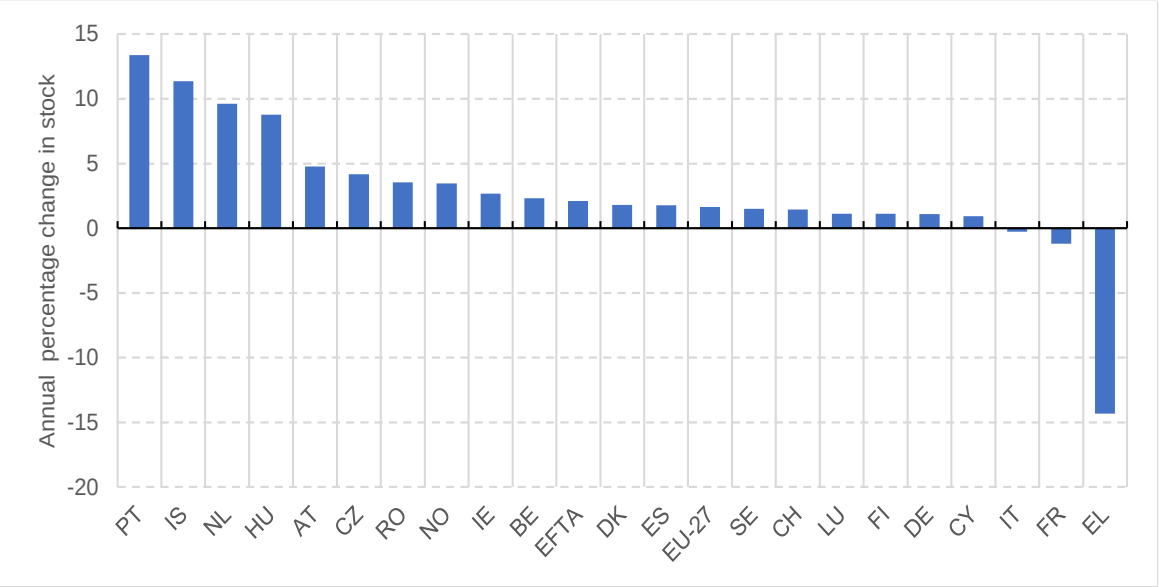
EU aggregate: EU-27
Numbers on stocks of EU-27 movers are estimated for: 2019 and 2020 CY, FR, HR, EL, MT, PT; 2019 for DE; based on shares of EU-27 movers from EU-28 movers in EU-LFS data.
Provisional data: FR, PL. estimated numbers: PL, RO.
Left y-axis: absolute numbers of movers in thousands; Right y-axis: movers as a percentage of the total working age population in the country.
Countries with stocks of <50,000 (BG, HR, EE, IS, LV, LT, MT, PL, RO, SK and SI) are not presented in the graph. Numbers of stocks of movers in these countries can be found in Tables A2 and A3 in Annex B.1. Share of mobile population in Luxembourg: (42 %).

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

While the overall stocks of mobile EU-27 citizens of working age increased by around 2 % in EU-27 and EFTA countries in 2020 compared to 2019, there were significant variations between countries.

With some exceptions, countries with stocks of more than 50 000 EU-27 movers of working age in 2020 experienced a rise in the number of these citizens living on their territory between 2019 and 2020 (Figure 5). Stocks of working-age EU mobile citizens jumped more than 10 % in Portugal, Iceland and the Netherlands, and grew by around 9 % in Hungary in a year. Stocks expanded by nearly 5 % in Austria and Czechia. Growth was more modest among some of the main destination countries in 2020, including Germany, Spain and Switzerland. In contrast, France and Italy experienced a slight decline in the number of working-age mobile EU-27 citizens having their usual residence on their territories while Greece underwent a large contraction in its inward stock between 2019 and 2020.

Figure 5: Annual percentage change in stocks of EU movers aged 20-64 years, 2019-2020



EU aggregate: EU-27
Numbers on stocks of movers are estimated for: CY, FR, HR, EL, ML, PT;
Countries with stocks of <50,000 are omitted from the graph: BG, HR, EE, LV, LT, MT, PL, RO, SK and SI.

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

The above growth rates in the stocks of EU-27 working age movers between 2019 and 2020 are dependent on the level of stocks at the beginning period. Countries with relatively low stocks are more likely to enjoy high relative changes. For this reason, it is useful to examine the variations in absolute numbers of mobile citizens in addition to the growth rates.

Table 2 shows the development of stocks of working-age EU mobile citizens in the top ten destination countries between 2016 and 2020, and Figure 6 the distribution in the largest five countries of residence. It shows that Germany, Spain, Austria and the Netherlands have experienced the largest changes in inward mobility. These countries gained between 20 000 and 40 000 additional mobile EU-27 citizens between 2019 and 2020. A more retrospective look at these changes reveals contrasting trends in these ten countries between 2018 and 2020. The inward stock of EU-27 movers of working age increased at a significantly slower rate in Germany over the period 2019-2020, compared to the period 2018-2019. Ireland followed a similar trend, although the decrease was more moderate between 2019 and 2020. The inward stocks of these citizens expanded at an increasing but modest rate in Spain, Austria, Switzerland and Belgium throughout these years. The number of mobile EU-27 citizens of working age decreased in Italy between 2019 and 2020; however, this decrease was much smaller than the one undergone by this country between 2018 and 2019. This number went down in France between 2019 and 2020 after an increase between 2018 and 2019. Finally, it grew at a higher rate in Norway between 2019 and 2020, compared to the previous period.

Looking at longer trends over the second half of the past decade suggests that Germany has lost some of its pulling power as a destination for EU-28 workers since 2016. In 2016 the number of EU mobile citizens in Germany increased by almost 250 000 whereas in 2019 the growth was around 35 000. An important factor for this development was the decline in net flows from the two most important countries of origin, Poland and Romania. Looking at German national data also shows that for the main countries of origin of movers (Bulgaria, Croatia, Italy, Poland, Romania), net mobility was negative in 2018 and 2019. Particularly

large decreases in net flows in 2019 can be seen with Romania and Poland (- 22 000 and -18 000, respectively), but also with Croatia (- 11 000)[45].

Table 2: Stocks of EU movers in the 10 main destination countries, 2016-2020[46]

	EU-28					EU-27		
	2016	2017	2018	2019	Trend	2019	2020	Trend
				Stock of EU working age movers (thousands)				
DE	2 935	3 047	3 200	3 321		3 254	3 290	
ES	1 402	1 393	1 385	1 406		1 258	1 280	
IT	1 176	1 187	1 201	1 147		1 128	1 125	
CH	980	997	1 007	1 018		990	1 004	
FR	954	964	960	969		922	911	
BE	601	609	617	630		616	630	
AT	465	493	520	546		538	563	
NL	362	385	414	447		410	449	
IE	321	331	336	346		268	275	
NO	267	271	273	277		265	274	
				Annual change (thousands)				
DE	231	112	153	121		118	35	
ES	- 22	- 9	- 8	21		20	22	
IT	14	11	14	- 54		- 53	- 3	
CH	25	18	10	11		11	14	
FR	6	10	- 3	8		20	- 11	
BE	14	8	8	13		13	14	
AT	34	28	27	26		25	26	
NL	20	24	28	33		32	39	
IE	5	10	5	10		9	7	
NO	9	3	2	4		4	9	

EU aggregates: EU-28: 2016-2019. EU-27: 2019-2020
The graph presents the ten Member States with the largest numbers of EU-27 movers in 2020.
Member States are presented in descending order of stocks of EU-27 movers in 2020.
Due to lack of reported statistics, numbers on stocks of EU-27 movers are estimated for: 2019 and 2020 CY, FR, HR, EL, MT, PT; 2019 for DE; based on shares of EU-27 movers from EU-28 movers in EU-LFS data.
Provisional data for PL (2014-2020) and FR (2018-2020). estimated numbers for PL (2016-2020), IE (2019) and RO (2020). breaks in time series for FR (2014) and LU (2017).

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

In Spain, the growth in numbers of EU-27 movers by 2 % in 2020 was higher than in the previous years. Stocks of EU-28 working age movers had declined between 2016 and 2018, before starting to grow in 2019. A large part of this growth can be attributed to Italian movers (the second largest group of EU movers in Spain) whose stocks have been growing more and more strongly for several years.

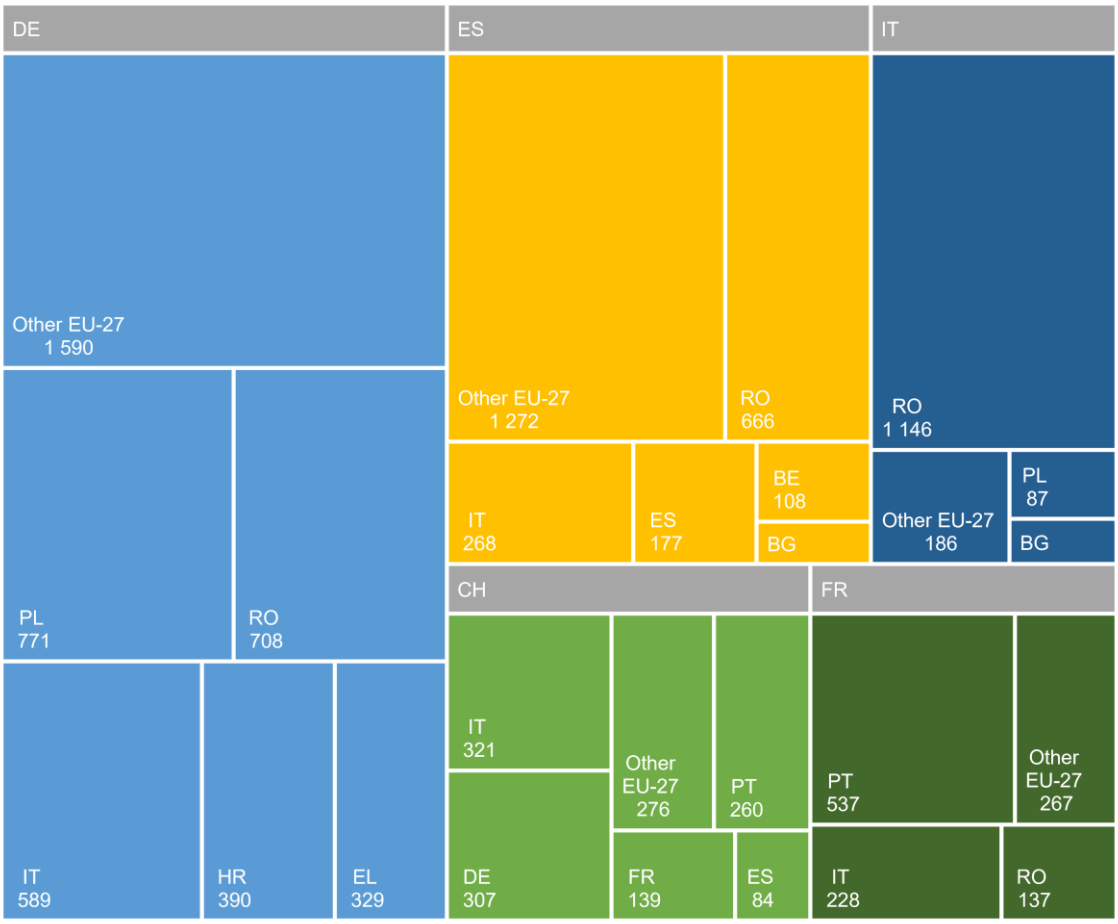
In France, total numbers of EU-27 working age movers declined by 10 000 persons in 2020. An analysis by groups of movers is difficult because data by citizenship for 2020 is provisional and estimated the same as in 2019 – however, in 2019, there was a decrease of 12 000 persons among Portuguese movers (the largest group in France), while all other groups slightly grew.

In Italy, the slight decrease in 2020 (- 3 000) follows a larger decrease in 2019 (- 50 000). Numbers of EU movers had been growing only marginally between 2016 and 2018. The declines in 2019 and 2020 are almost entirely attributable in the decline in numbers of Romanian movers, by far the largest group in Italy; numbers of Polish and Bulgarian movers also declined, but to a much lower extent.

[45] German National Statistical Office (Destatis), Table 12711-0007 'Wanderungen zwischen Deutschland und dem Ausland: Deutschland, Jahre, Staatsangehörigkeit', extracted 16/09/2021, available at: https://www-genesis.destatis.de/genesis/online?operation=statistic&levelindex=0&levelid=1631791474161&code=12711#abreadcrumb

[46] Numbers on annual stocks for all EU-28/EU-27 countries are presented in **Table A2** in **Annex B.1.**

Figure 6: Breakdown by citizenship of EU movers (all ages) in the top five countries of residence, 2020



EU aggregate: EU-27. Numbers expressed are in thousands.

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

In Belgium, growth has also stagnated since 2016, with a slight dip in 2017 and 2018. Similar observations can be made in Austria and Ireland where growth stagnated with some exceptions, over that period. In Norway, growth declined strongly between 2016 and 2018 and then increased again. The Netherlands is the only country where growth in numbers of EU-27 working age movers continuously increased between 2016 and 2020. Numbers increased by 30 000 to 40 000 each year, of which around 10 000 were Polish movers, and the rest made up of different groups, especially Romanians and Italians, but also Spanish, Hungarians, Latvians, Lithuanians.

Table 3 shows the shares of different groups in the non-national working age population in the EU-27 and EFTA countries and the main countries of destination in 2020. EU-27 working-age movers made up 38 % of the non-national population in the EU-27 in 2020. The proportion of third-country nationals was 62 %, with EFTA nationals representing only 0.6 %. This make-up was roughly similar in all main destination countries, with shares of EU-27 working age movers slightly higher in Germany and slightly lower in Spain. In Italy and France, shares of EU-27 working-age movers only made up 31 % and 28 % of the total foreign working age population, respectively, with third-country nationals accounting for 70 % in each country. France had the highest share of EFTA working age movers, at almost 1 % (28 000), while Germany hosted the highest *number* of EFTA working age movers in absolute terms (35 000). The most important sending EFTA country is Switzerland. Spain

hosts around twice the number of Swiss working-age nationals than Italy (8 300 versus 4 500); furthermore, Spain hosts more Norwegians (6 900) than Germany (5 200) and Italy (760), making it the EU Member State with the third largest population of working-age EFTA nationals.

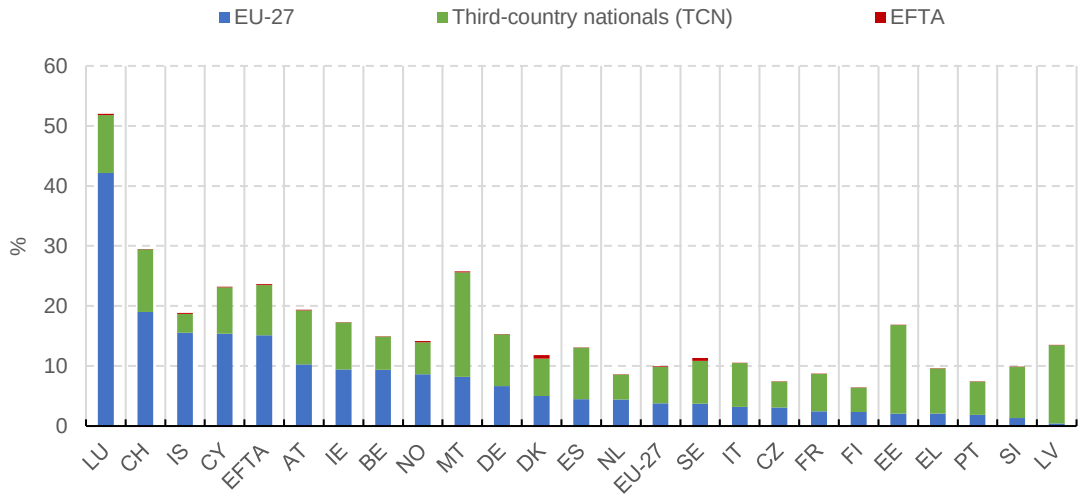
Table 3: Top five countries of residence of EU movers (all ages), 2020[47]

	EU-27		EFTA		Third-country nationals		Total foreign population	
	1 000s	%	1 000s	%	1 000s	%	1 000s	%
EU-27	9 942	37.9	160	0.6	16 128	61.5	26 230	100.0
EFTA	1 312	64.1	10	0.5	726	35.4	2 048	100.0
DE	3 290	43.1	35	0.5	4 305	56.4	7 629	100.0
ES	1 280	34.0	16	0.4	2 470	65.6	3 766	100.0
IT	1 125	30.5	5	0.1	2 552	69.3	3 682	100.0
CH	1 004	64.4	3	0.2	551	35.4	1 558	100.0
FR	911	27.9	28	0.9	2 321	71.2	3 261	100.0

EU aggregate: EU-27
Provisional data for PL (2014-2020) and FR (2018-2020). Estimated numbers for PL (2016-2020), IE (2019) and RO (2020). breaks in time series for FR (2014) and LU (2017).
Due to lack of reported statistics, numbers on stocks of EU-27 movers are estimated for: 2019 and 2020 CY, FR, HR, EL, MT, PT; 2019 for DE; based on shares of EU-27 movers from EU-28 movers in EU-LFS data.

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

Figure 7: Share of mobile citizens aged 20-64 years in the total population of selected EU-27 and EFTA countries, 2020



Aggregates: EU-27, EFTA
Share of EU-27, EFTA nationals and TCNs within the total population, only countries with 5 % or more foreign population presented (BG, HR, HU, LT, PL, RO, SK excluded).
Provisional data for PL (2014-2020) and FR (2018-2020). estimated numbers for PL (2016-2020), IE (2019) and RO (2020). breaks in time series for FR (2014) and LU (2017).
Due to lack of reported statistics, numbers on stocks of EU-27 movers are estimated for: 2019 and 2020 CY, FR, HR, EL, MT, PT; 2019 for DE; based on shares of EU-27 movers from EU-28 movers in EU-LFS data.

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

[47] The row sum of shares may not equal 100 % due to rounding of numbers.

EFTA countries had a much higher share of EU-27 citizens (64 %) than TCNs (35 %) in their foreign working-age population.

Figure 7 shows the share of the different groups of the non-national population in the working-age population in EU-27 and EFTA countries in 2020, sorted by share of EU-27 movers, in descending order. Countries with less than 5 % non-national population are not shown (Bulgaria, Croatia, Hungary, Lithuania, Poland, Romania, Slovakia). Luxembourg is the only country where non-nationals accounted for more than 50 % of all residents; most of them were EU movers.

Several factors can explain the cross-country variations in the shares of non-nationals. Next to geographical and historical proximity, some countries, such as France and the Netherlands have a relatively high rate of naturalisation. Other countries, e.g. Estonia, Latvia, but also Austria and Czech Republic, have much lower naturalisation ratios[48]. Further factors include lenient conditions for acquisition of nationality by descent (e.g. Poland, Romania), language barriers (e.g. Finland, Hungary), and a long period of residence required for naturalisation (e.g. Spain, Slovenia, Lithuania)[49].

1.1.3. EU mobile workers: countries of origin

This subsection presents an overview of the nationalities of working-age movers. It uses data from the EU-LFS[50].This is important to note because data from this source account for whole years (the latest being 2020) and thus reflect more recent developments than the data from the countries of destination presented above (where latest data refer to 1 January 2020).

In 2020, Romanians accounted for 24 % of all movers across the EU-27. 11 % of movers were Italian, 11 % were Polish, 7 % Portuguese, Croatians and Bulgarians each 5 % and German, French, Greek and Spanish movers some 4 % each.

Although Romanians remained the largest single national group among movers in 2020, their number decreased between 2019 and 2020. Stocks of Polish and Bulgarian movers also declined. Considering that for these nationalities Germany is a major destination country and the problems linked to German 2020 LFS data[51], it is impossible to give a precise figure. The decline for Romanians is estimated at approximately 6 % and for Polish and Bulgarians approximately 11 %.

A smaller decrease can be seen among Portuguese working age movers (-2 %). By contrast, the stocks of Croatian and Italian working age movers grew (+9 % and +2 %, respectively). The increase in numbers of Croatian working age movers mainly happened in Austria and Germany, which hosted the largest numbers. In Germany, numbers were rising in recent years, while Austria saw a notable increase between 2019 and 2020. This was most likely because Croatians gained full access to the Austrian labour market in July 2020. Austria was the last Member State to end transitional arrangements for Croatian citizens following Croatia's accession to the EU.

[48] De Lange, T. & Groenendijk, K. (2021), 'The EU's legal migration acquis: Patching up the patchwork', acquired from: https://wms.flexious.be/editor/plugins/imagemanager/content/2140/PDF/2021/Immigration_IP.pdf

[49] European Parliamentary Research Service (2018), "Acquisition and loss of citizenship in EU Member States", acquired from: https://www.europarl.europa.eu/RegData/etudes/BRIE/2018/625116/EPRS_BRI(2018)625116_EN.pdf

[50] Data by citizenship is not available for several countries, thus it is not possible to calculate an EU aggregate, therefore this section relies on EU-LFS data. A comparison of the main national groups in the main countries of residence between the sources shows that results are very similar.

[51] See 'Methodological notes' in the introduction.

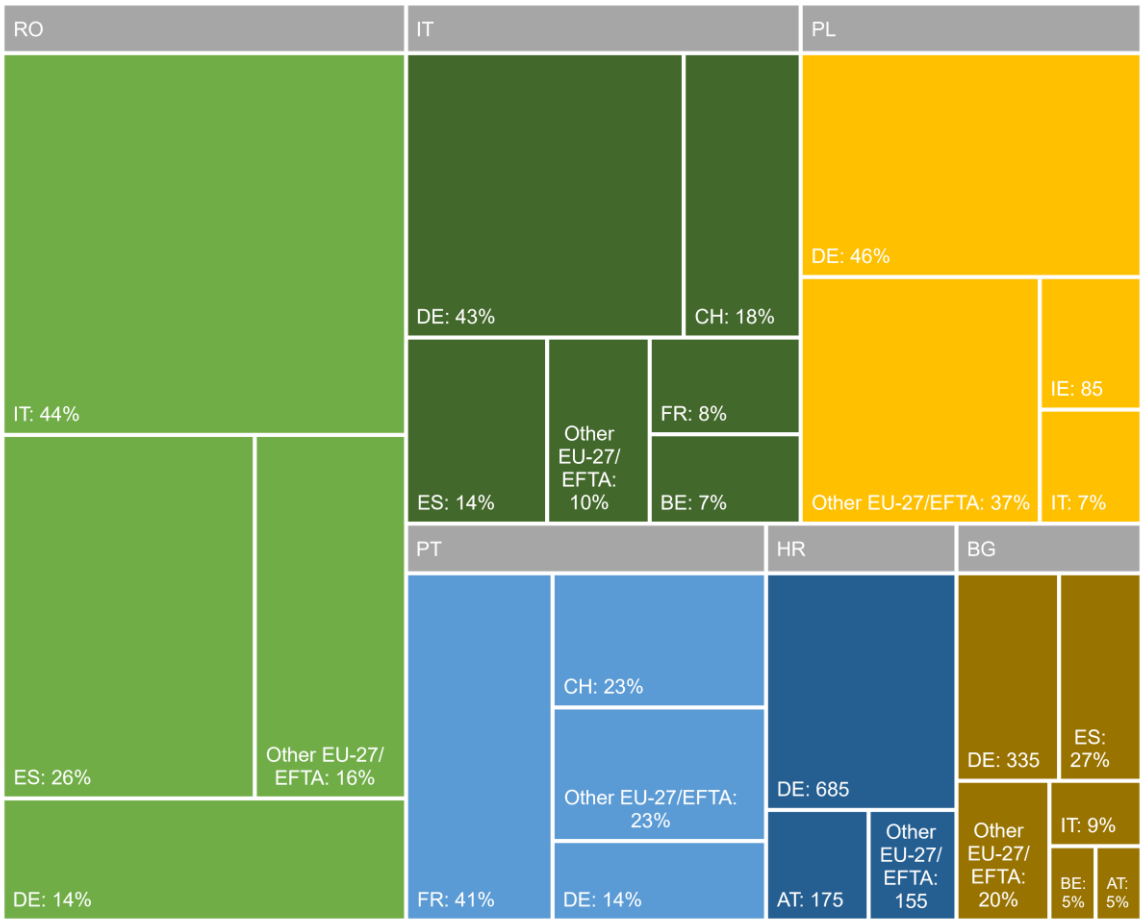
Table 4: Composition of EU mobile workers aged 20-64 years, 2016-2020

	EU-28				EU-27	
	2016 (%)	2017 (%)	2018 (%)	2019 (%)	2019 (%)	2020 (%)
BG	4.1	4.5	4.7	4.7	5.3	4.7
HR	2.9	3.0	3.2	3.3	4.3	4.8
IT	9.4	9.4	9.6	9.7	10.7	11.1
PL	15.6	15.1	14.1	14.3	12.0	10.8
PT	7.1	7.2	7.0	6.8	7.2	7.3
RO	20.0	20.2	21.3	21.7	25.2	24.2
Other EU-28/EU-27	39.6	39.2	38.7	38.2	33.9	35.7
EFTA	1.3	1.4	1.3	1.3	1.4	1.4
Total	100	100	100	100	100	100

EU aggregates: EU-27: 2019-2020. EU-28: 2016-2019

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

Figure 8: Main destination countries of EU movers aged 20-64, by main sending country, 2020



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

As shown in Table 4, the composition of movers by nationality has remained largely the same over the previous five years. The largest absolute increase in numbers can be noted

among movers from Romania; further smaller increases occurred among movers from Italy, Bulgaria and Croatia. Numbers of Portuguese movers remained almost the same, while numbers of Polish movers declined slightly.

Figure 8 shows the most important countries of destination of the main nationality groups of working age movers. Germany was the most important destination countries for many groups (Polish, Italian, Croatian and Bulgarian movers). However, for Romanian movers, Italy and Spain were substantially more important. For the Portuguese, France was the number one country of residence, and Bulgarians were found in larger numbers in Spain (after Germany). Aside from Germany as principal destination country, many Croatians lived in Austria, while Italians and Portuguese had large numbers of movers in Switzerland.

1.1.4. Characteristics of EU/EFTA movers

1.1.4.1. Age structure of EU-27 movers

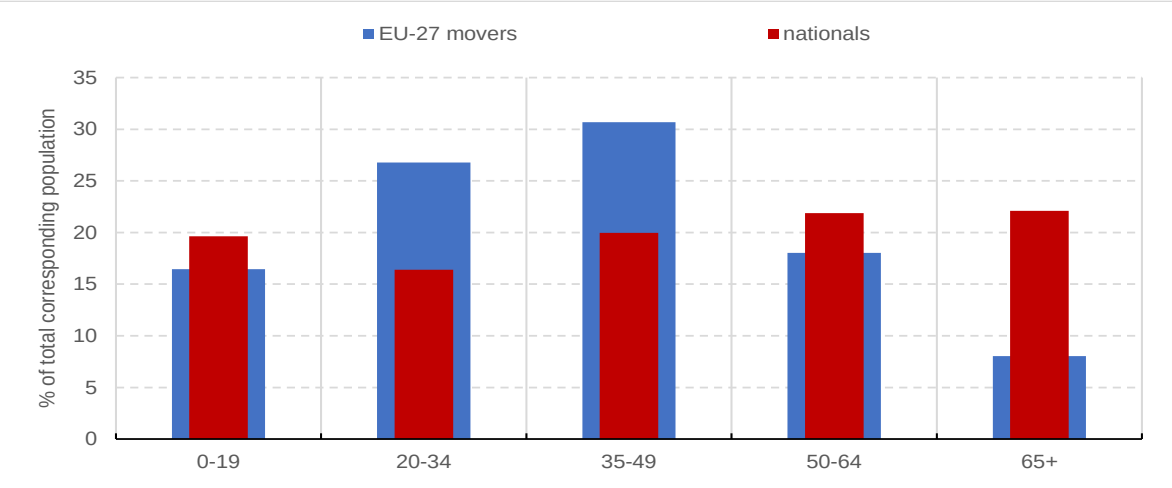
In 2020, 76 % of EU-27 mobile citizens were of working age, compared to 58 % of non-mobile citizens. Mobile citizens are concentrated in the age groups 20-34 and 35-49. Only a small share of mobile citizens (8 %) are aged 65 or over (Figure 9).

Figure 10 shows the share of working-age people among the EU mobile population and non-mobile population, by host country. In all Member States for which data is available, between 55 % and 63 % of the non-mobile population was of working age. Among EU-27 movers, the share of working-age people ranged from 69 % in Belgium to 85 % in Iceland. The difference between EU-27 movers and nationals was largest in several countries hosting very few EU-27 mobile citizens (Iceland, Czechia, Romania, Estonia, Denmark). In host countries with larger numbers (more than 250 000) of EU-27 mobile citizens, the share of working age people in the mobile citizen population was particularly high in Ireland and the Netherlands, while Switzerland and Belgium showed a lower share.

Correspondingly, Belgium and Switzerland had higher shares of over 64s in their population of EU mobile citizens (Figure 11) than the EU aggregate.

In addition to some Eastern European countries, Portugal and Sweden had rather large groups of elderly people among their population of movers (above 10 %). Germany and Spain were also on the upper end of average, at 9 % apiece, although both countries also had rather high shares of elderly people in their native population. The Netherlands, Italy and Ireland were all important host countries with low shares of elderly movers (less than 5 %).

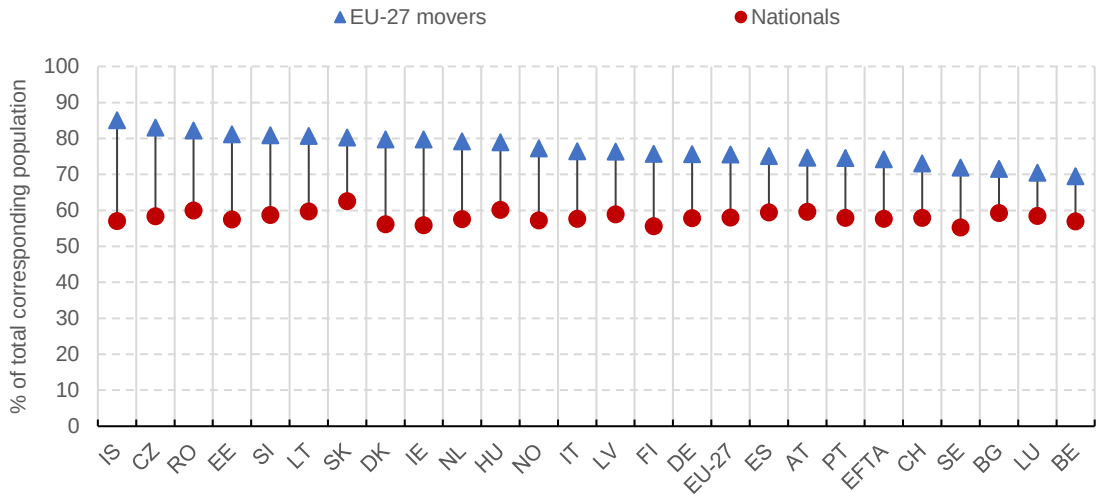
Figure 9: Age structure of EU-27 movers compared to non-mobile EU population, 2020



EU aggregate: EU-27
Due to lack of data for EU-27 movers for certain countries, and better comparability with the aggregate for nationals, all aggregates exclude: CY, DE, EL, FR, HR, MT, PL.
Provisional data for PL and FR (2018-2020); estimated numbers for RO (2020).

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

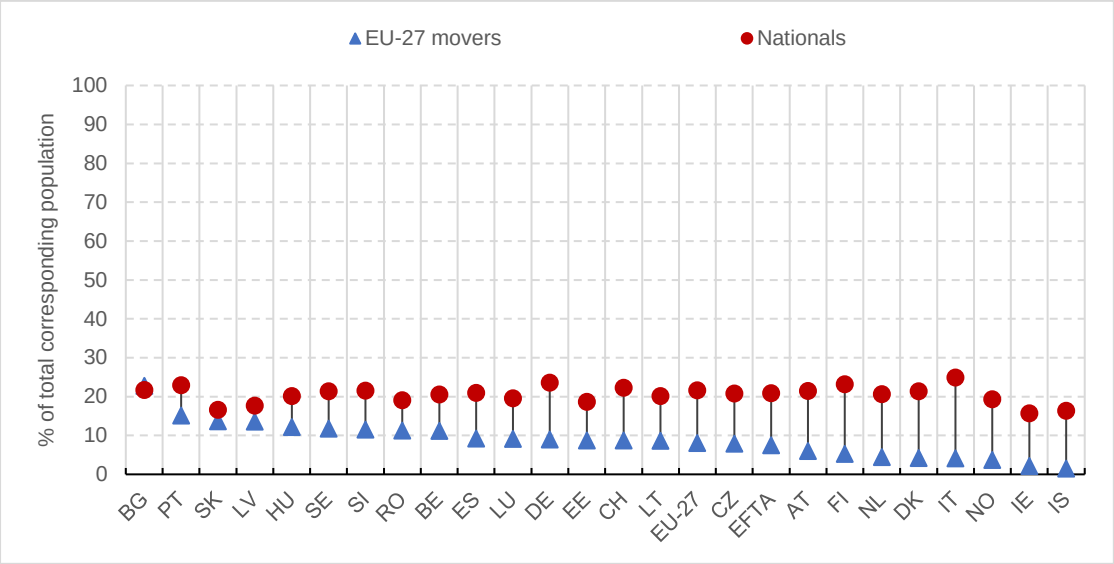
Figure 10: Shares of people aged 20-64 among EU movers and among non-mobile citizens of the host country, 2020



Aggregate: EU-27
Due to lack of data for EU-27 movers, the EU-27 aggregate for 2020 excludes: CY, EL, FR, HR, MT, PT.
Estimated numbers for Romania

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

Figure 11: Shares of people aged 65 years and older among EU movers and non-mobile citizens of the host country, 2020



Aggregate: EU-27
Estimated numbers for RO (2020).
Due to lack of data for EU-27 movers the EU-27 aggregates for nationals and EU-27 movers exclude: CY, EL, FR, HR, MT, PT.

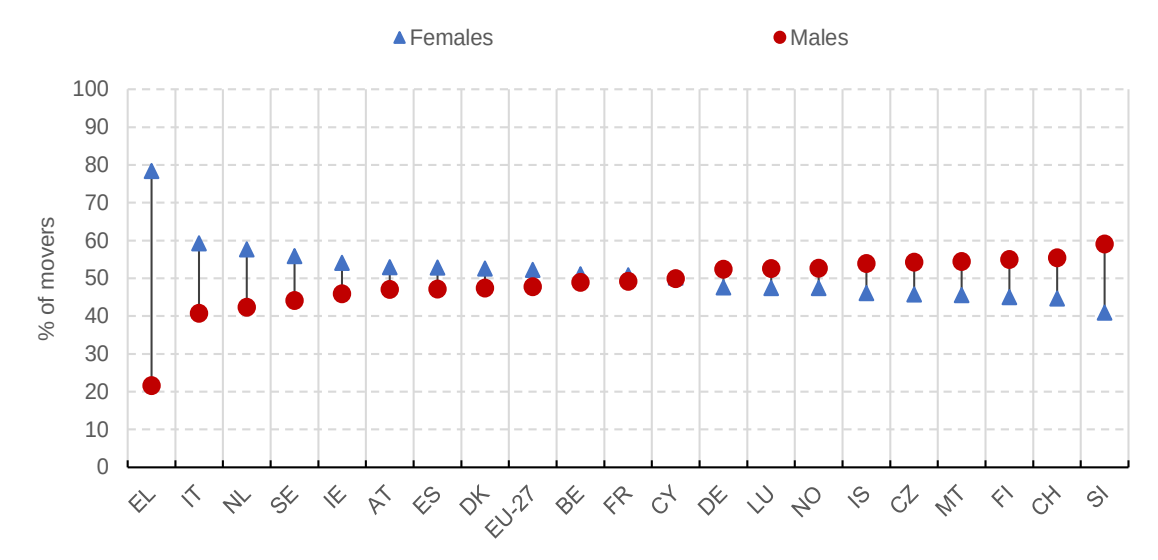
Source: Eurostat, population statistics [migr_pop1ctz], Milieu calculations.

1.1.4.2. Gender distribution of EU-27 movers

In 2020 a higher proportion of EU-27 mobile citizens of working age were female (52 %) than male. As shown in

Figure 12, in most Member States the difference between the share of female and male mobile citizens was less than ten percentage points.

Figure 12: Gender distribution of EU movers aged 20-64 years, by country of destination, 2020



Aggregate: EU-27

Data shown for all countries where data were above reliability limits.
Data exclude movers born in their country of residence.

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

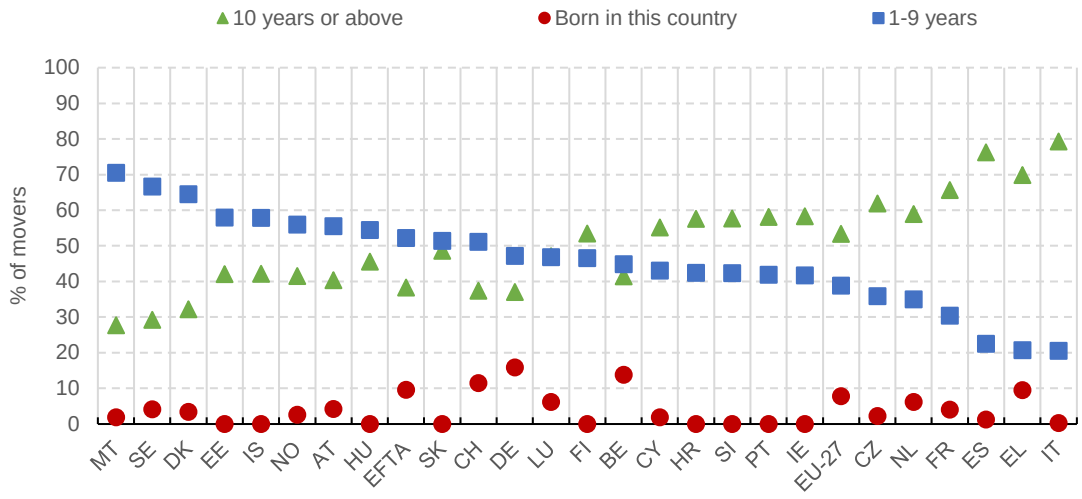
In Slovenia almost 60 % of mobile citizens were male; at the other end of the scale, almost 60 % of mobile citizens in Italy were female. The biggest outlier is Greece, where 78 % of EU mobile citizens of working age were female.

1.1.4.3. Length of stay

The majority of EU-27 movers of working age have lived in their country of residence for more than ten years without having been born there (53 %). Around 8 % were born in their country of residence (mostly as children of movers) and 39 % arrived in the past ten years (Figure 13).

Nevertheless, the average length of stay differs substantially between countries. In several countries the share of those who arrived in the past ten years goes well beyond the EU average of 39 %. This is the case for Sweden, Norway, Switzerland, and Austria and Germany. Germany and Austria both experienced large increases in inflows after 2011 and after 2014 – the two years when the transitional arrangements for Eastern European nationals ended and the citizens of these countries gained full access to the EU labour market. No such increase is evident in Switzerland, and Sweden, both countries registering steady inflows since 2009.

Figure 13: EU movers aged 20-64 years, by country of residence and length of stay, 2020



Aggregate: EU-27
EU-27 movers by country of residence and years of residence, shares of different groups in percentages. Countries are presented by the largest proportion of movers with up to 10 years' residence in the country.
All EU-27 countries for which values were above reliability limits for two or more categories are included. Low reliability for: 'born in this country': MT, DK, CY, CZ, HR, IT, SK, SI; '10 years or more': HR, SK.

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

1.2. Mobility trends of EU-27/EFTA movers: mobility flows

This section presents inflows, outflows and net flows of EU-27 and EFTA mobile citizens to and from EU and EFTA countries. This is a means of having a view of the flux of intra-EU labour mobility, showing the inflows and outflows of both citizens of an EU or EFTA country and nationals of other EU or EFTA countries[52].

1.2.1. Overall outlook – net intra-EU mobility and net migration

'Net mobility' refers to the difference between inflows and outflows of persons. Positive net mobility indicates that more people in a population group are moving into a country than out of it, while negative net mobility means that more people are leaving a country than moving to it. Because of data restrictions, the net mobility flows may include EU citizens coming from or moving to third countries[53]. The separate concept of 'net migration' also includes third-country nationals.

Figure 14 and Figure 15 present an overview of the net flows of different groups of working age citizens to and from EU and EFTA countries. They show the Netherlands, Germany, Spain and Austria as the main net receivers of EU and EFTA citizens, with net mobility flows between 30 000 and 50 000. Belgium was next, with 12 000. All other countries have net mobility flows below 10 000.

Most of the EU-13 Member States remained net sending countries[54] when third-country nationals were excluded. The exceptions were Hungary and Estonia, both of whose net inflows of their own nationals contributed to net positive mobility flows overall. The largest net sending countries were Poland, Romania and Italy. Although a net receiver of non-Italian EU-27/EFTA movers (receiving about as many as Spain, Austria and Belgium), the outflows of Italy's own nationals were so large that the overall net outflows were higher than for Romania.

When including third-country nationals of working age, most countries had net positive migration flows (more people arriving than leaving). However, net migration to three countries was particularly high: six times more inward than outward mobility in Spain, four times as many in Germany, and twice as many to Italy. The Netherlands also saw net migration flows of over 50 000. Net inflows of TCNs were larger than net inflows of EU-27/ EFTA movers in all examined countries except in Austria, Germany, Switzerland, Luxembourg, Belgium and Slovakia.

[52] Data availability means that the latest years of study vary between Section 1.1 and Section 1.2. The most up-to-date stock data presented in Section 1.1 refer to the state of play on 1 January 2020, while flow data refer to mobility flows during the year 2019. Therefore, the flow data should be reflected in the stocks.

[53] Data restrictions prevent simultaneous identification of citizenship and next/previous country of residence of the mover, thus mobility flows within the European Union are approximated by mobility of EU citizens, but 'net mobility' flows may include EU citizens coming from or moving to third countries.

[54] Slovakia, Lithuania, Slovenia, Czechia, Latvia, Bulgaria, Romania and Poland.

Figure 14: Net migration and mobility flows, by country of residence, 20-64 years, 2019[55]

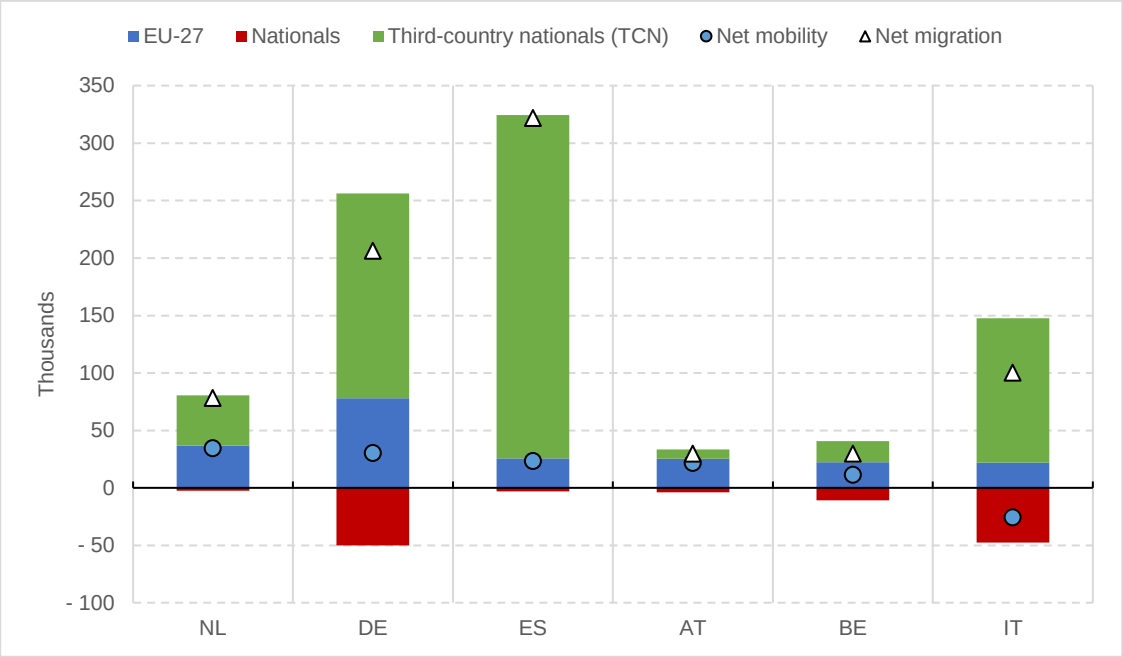


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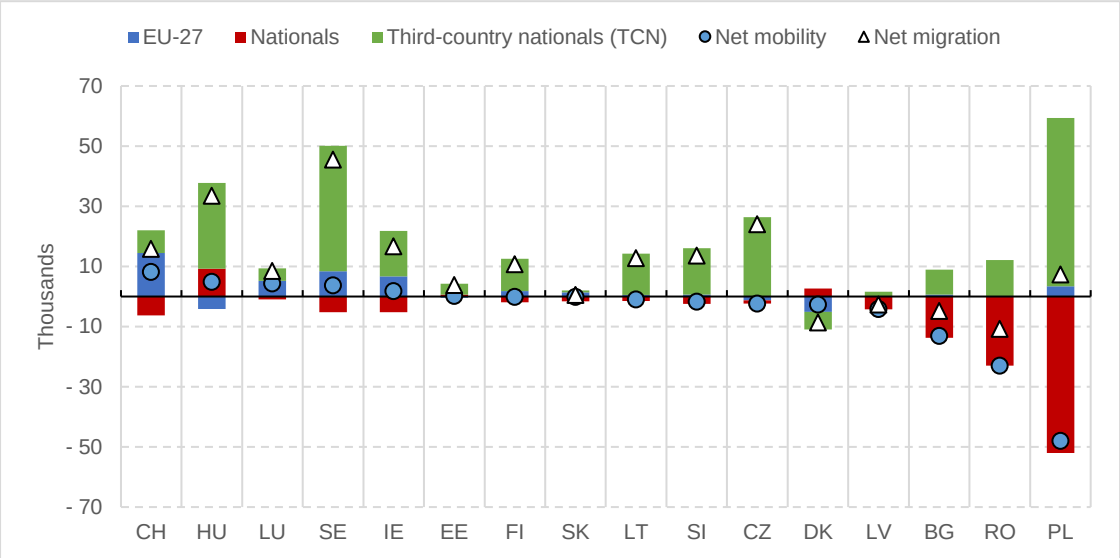
Figure 15: Net migration and mobility flows, by country of residence, countries with smaller totals, 20-64 years, 2019



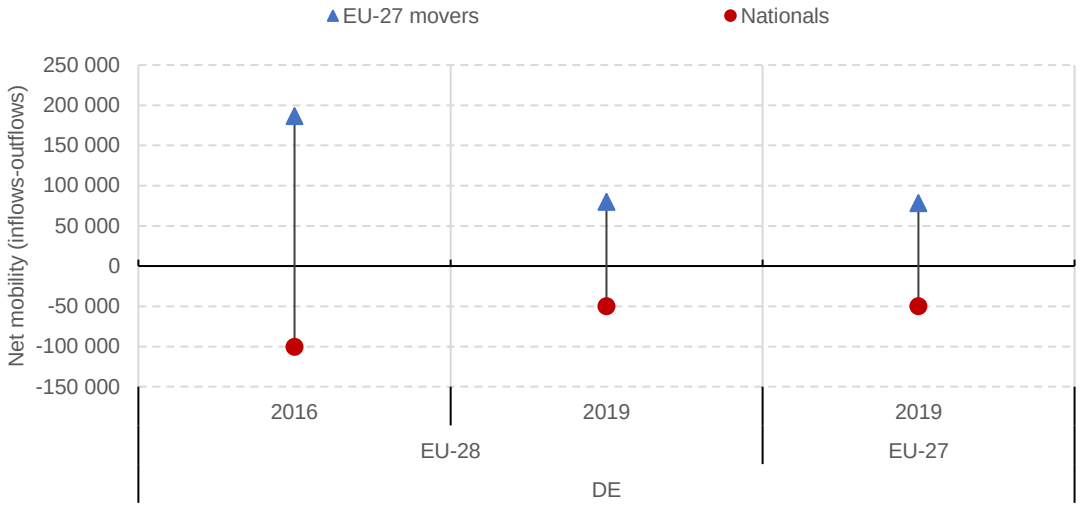
EU aggregate: EU-27
Figures relate to persons moving to and from the country indicated, regardless of previous residence. Figures may therefore include EU-27 and EFTA citizens moving to or from third countries.
Data on inflows of EU-27 movers are estimated for: CY, EL, IE, MT, PL, PT, based on EU-LFS data; for DE, based on national data (Wanderungsstatistik); for FR and HR, based on immigration data for all ages.
Data on outflows of EU-27 movers are estimated for: IE and PL, based on EU-LFS; for DE, based on national data (Wanderungsstatistik).
CY, EL, FR, PT are not displayed because data on outflows by age/citizenship are not available.
Inflows: provisional data for BG, PL, SK; estimated numbers for DE, PL, RO; break in time series for DE.
Outflows: provisional data for BG and PL; estimated numbers for DE, PL, RO; break in time series for DE.

[55] Data for all countries on inflows, outflows and net flows of nationals and of EU-28/EU-27 movers can be found in Tables A3 and A4 in Annex B.1.

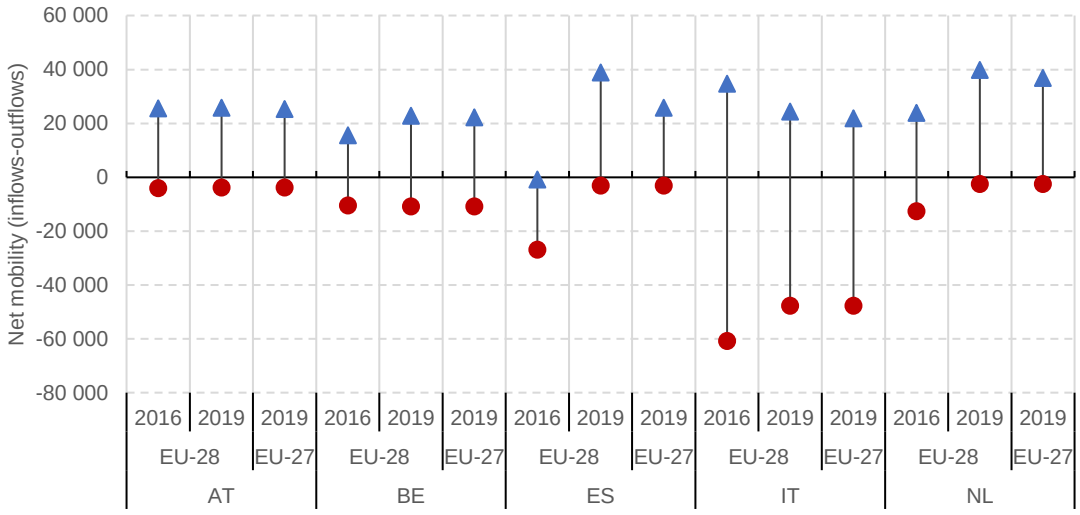
Source: Eurostat, international migration statistics [migr_emi1ctz, migr_imm1ctz], Milieu calculations.

Figure 16: Net mobility of EU movers and nationals aged 20-64, by principal destination countries, 2016 and 201956

A. Germany



B. Principal destination countries



Aggregate: EU-27
Data on inflows of EU-27 movers are estimated for: CY, EL, IE, MT, PL, PT, based on EU-LFS data; for DE, based on national data (Wanderungsstatistik); for FR and HR, based on immigration data for all ages.
Data on outflows of EU-27 movers are estimated for: IE and PL, based on EU-LFS; for DE, based on national data (Wanderungsstatistik).
CY, EL, FR, PT are not displayed because data for outflows by age/citizenship are not available.
Inflows: provisional data for BG, PL and SK (2016). Estimated numbers for DE (2019), PL, RO (2019). Break in time series for DE (2016-2019).
Outflows: provisional data for PL (2019). Estimated numbers for DE (2019), PL (2019), RO (2019). Break in time series for DE.

[56] Data for all countries on inflows, outflows and net flows EU-28/EU-27 movers can be found in Table A4 in Annex B.1.

Source: Eurostat, international migration statistics [migr_emi1ctz, migr_imm1ctz], Milieu calculations.

Above, Figure 16 shows trends in net mobility flows for EU-28/EU-27 movers and for nationals of working age for the main destination countries between 2014 and 2019. Figure 17 shows trends in net flows of nationals in 2016 and 2019 for the main net-sending countries.[57] Hungary is included in Figure 19 because of its interesting development (see below).

Developments between 2019 and the five previous years differed considerably between Member States. Belgium, Spain and the Netherlands, important net receiving countries, saw increases of net mobility from 2018 to 2019, both for total net mobility (including their own nationals) and for EU-28/EU-27 movers only. Spain is the only country which changed from a net sending country (until 2017) to a net receiving country of EU/EFTA citizens.

In Austria, net inflows of EU/EFTA movers had declined between 2015 and 2016, but remained fairly similar since then, while outflows of nationals were low and stable over the years.

In Germany, net inflows of EU-27 movers went down to about 80 000 in 2019 from 130 000 in 2018. This follows a steady decline that could already be observed among EU-28 movers since 2015. Nevertheless, Germany remained substantially the largest net receiving country of EU-28/EU-27 movers in the EU[58]. Furthermore, the net outflows of its own nationals also decreased considerably (by 50 %) between 2015 and 2019. This should be interpreted with caution, given the methodological changes starting in that period.

In Italy, net inflows of EU-27 movers also decreased between 2018 and 2019, following a continuous decline in net inflows of EU-28 movers in the years before since 2016. At the same time, outflows of its nationals also decreased, but not very strongly, meaning that it was still a net sending country in 2019.

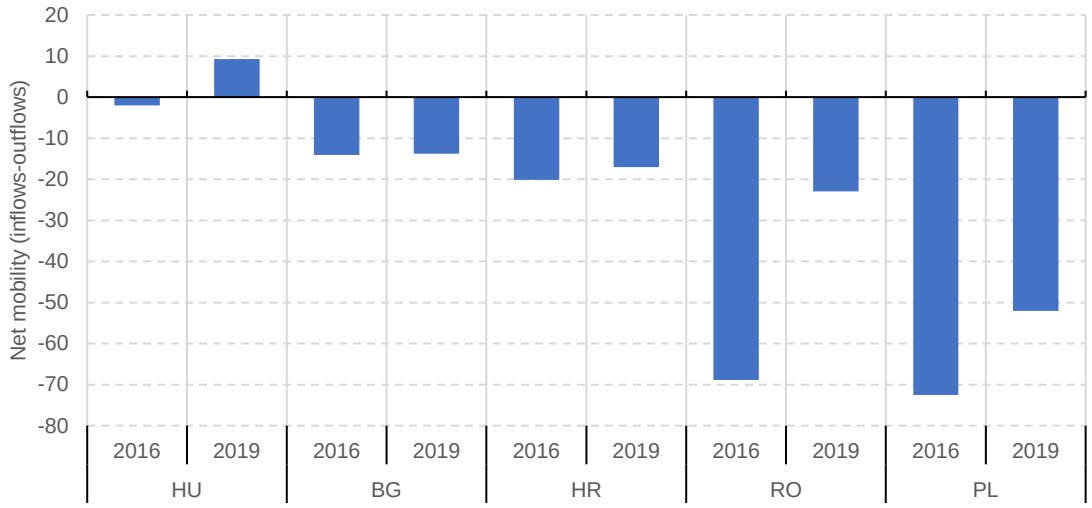
The development patterns in the main sending countries were the following: in Croatia, Romania, Italy, Poland, net outflows of nationals increased until 2016 and then decreased, however, to a different extent. In Romania, net outflows decreased by over 50 % down to 23 000. In Poland, net outflows decreased by around one third between 2016 and 2018, then remained stable in 2019. This decrease can largely be attributed to reduced outflows from Poland to the UK and increased return mobility from the UK to Poland (see Chapter 4). Net outflows from Croatia also decreased by almost 50 % between 2017 and 2019, while net outflows from Bulgaria remained stable.

A part of these decreases may be a natural follow-up to the very strong increases in outflows after the complete opening of the labour markets in 2011 and 2014. It can be noted that in Hungary net mobility among nationals turned from negative to positive between 2016 and 2019, and return mobility increased.

[57] Italy, Germany and Spain (until 2016) are also important sending countries, but not shown twice.

[58] The decrease in flows to and from Germany after 2015, especially the significant decrease in 2016, is likely to be in part due to methodological changes which result in a break in series for each year since 2016: Since 2016 migration data is only partially comparable with the previous years due to methodological changes in national migration statistics. From that year onward, arrivals and departures of Germans “with new/previous residence unknown / no data provided" are considered in the external migration figures, which was not the case before. This effect is inevitable for methodological reasons and affects especially the results for 2016 and, with a downward trend, the results for subsequent years. Furthermore technical developments in data delivery of registrations and a switch to a new statistical processing method may have led to this breaks. Source: Information provided upon request by email by Destatis, 23/07/2021.

Figure 17: Net mobility of nationals aged 20-64 for principal sending countries, 2016 and 2019[59]



See above.

Source: Eurostat, international migration statistics [migr_emi1ctz, migr_imm1ctz], Milieu calculations.

1.2.2. Inflows

Inflows of EU-27 working-age mobile workers to other EU-27 Member States decreased slightly in 2019 (Figure 18). 790 000 EU mobile workers went to another Member State in 2019, 9 000 less than in 2018. This continues a decline in inflows since 2015. Inflows in 2019 were 10 % less than in 2015, reflecting the decrease in outflows of nationals from the largest sending countries.

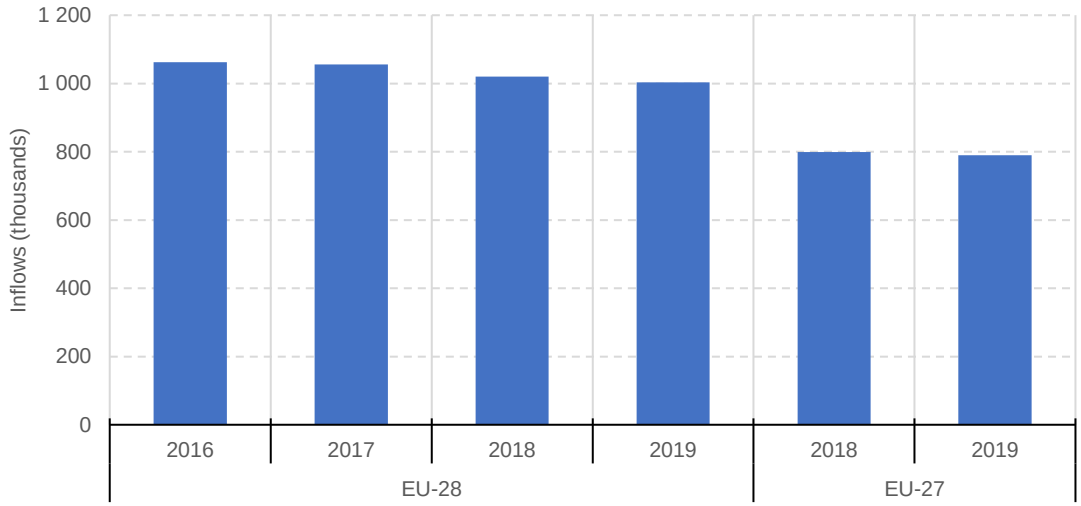
Table 5 shows the main EU-27/EFTA destination countries for inflows of EU-27 working-age movers in absolute numbers (on the left) and as a proportion of the country's population (on the right). For the smaller EU/EFTA countries, inflows of EU-27 mobile citizens make up a significant portion of the population. Luxembourg, Iceland and Malta had the highest inflows compared to their total population.

Figure 19 shows the inflow trends since 2015 for the main countries of destination. The seven main destination countries within the EU have remained the same (not counting the UK) throughout that period. In order of inflows, they are Germany, Spain, the Netherlands, Austria, Belgium, France and Italy. Switzerland is also an important destination country, placed between the Netherlands and Austria in terms of numbers of inflows.

Among these countries, only Spain and the Netherlands saw clear increases in inflows of movers during the period 2015 to 2019. In Germany inflows fell, but the country's overall importance as a destination country compared to the other countries remained high, attracting around a third of all inflows. The Netherlands saw a particularly large increase of inflows of EU-27 movers in 2019 (+13 %) as did Belgium (+7 %). For the Netherlands, this continued consistent increases in inflows since 2015; the country has now overtaken France and Italy as a destination country in terms of inflows.

[59] An overview of inflows, outflows and net flows of nationals for all countries for 2009-2019 can be found in Table A3 in Annex B.1.

Figure 18: Inflows of EU movers aged 20-64 to EU Member States, 2016-2019



Aggregates: EU-27: 2018-2019. EU-28: 2016-2019

Data on inflows of EU-27 movers are estimated for: CY, EL, IE, MT, PL, PT, based on EU-LFS data; for DE, based on national data (Wanderungsstatistik); for FR and HR, based on immigration data for all ages.

Data on outflows of EU-27 movers are estimated for: IE and PL, based on EU-LFS; for DE, based on national data (Wanderungsstatistik). Inflows: provisional data for BG (2014-2019), PL (2014-2018) and SK (2014-2018). Estimated numbers for DE (2014-2015, 2017-2019), PL (2016-2019), RO (2015, 2017-2019). Break in time series for DE (2016-2019).

Population data: provisional data for PL (2013-2019) and FR (2018). Estimated numbers for PL (2016-2018). Break in time series for EE (2015), FR (2014) and LU (2017).

Source: Eurostat, international migration statistics [migr_emi1ctz, migr_imm1ctz], Milieu calculations.

Table 5: Inflows to main countries of destination for EU movers aged 20-64, 2018-2019

Largest inflows of EU-27 movers in 2019 (percentage compared to 2018 in brackets)			Largest proportional inflows of EU-27 movers as a share of total population in country (percentage compared to 2018 in brackets)		
Member State	Thousands	Percentage change	Member State	%	Percentage change
DE	273.4	(-8 %)	LU	3.3 %	(+13.2)
ES	92.7	(+1 %)	IS	2.6 %	(+5.7)
NL	68.7	(+13 %)	MT	1.8 %	(+5.8)
CH	66.1	(+2 %)	CH	1.3 %	(+66.1)
AT	53.1	(+4 %)	CY	1.0 %	(+5.3)
BE	52.1	(+7 %)	AT	1.0 %	(+53.1)

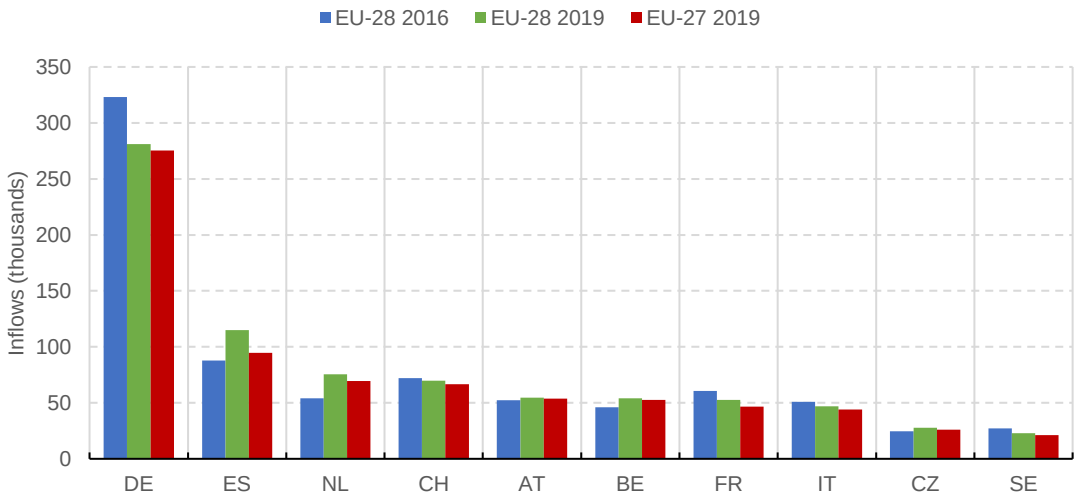
Aggregate: EU-27

Data on inflows of EU-27 movers are estimated for: CY, EL, IE, MT, PL, PT, based on EU-LFS data; for DE, based on national data (Wanderungsstatistik); for FR and HR, based on immigration data for all ages.
Inflows: provisional data for BG (2014-2019), PL (2014-2018) and SK (2014-2018). Estimated numbers for DE (2014-2015, 2017-2019), PL (2016-2019), RO (2015, 2017-2019). Break in time series for DE (2016-2019).
Population data: provisional data for PL (2013-2019) and FR (2018). Estimated numbers for PL (2016-2018). Break in time series for EE (2015), FR (2014) and LU (2017).

Source: Eurostat, international migration statistics [migr_emi1ctz, migr_imm1ctz], Milieu calculations.

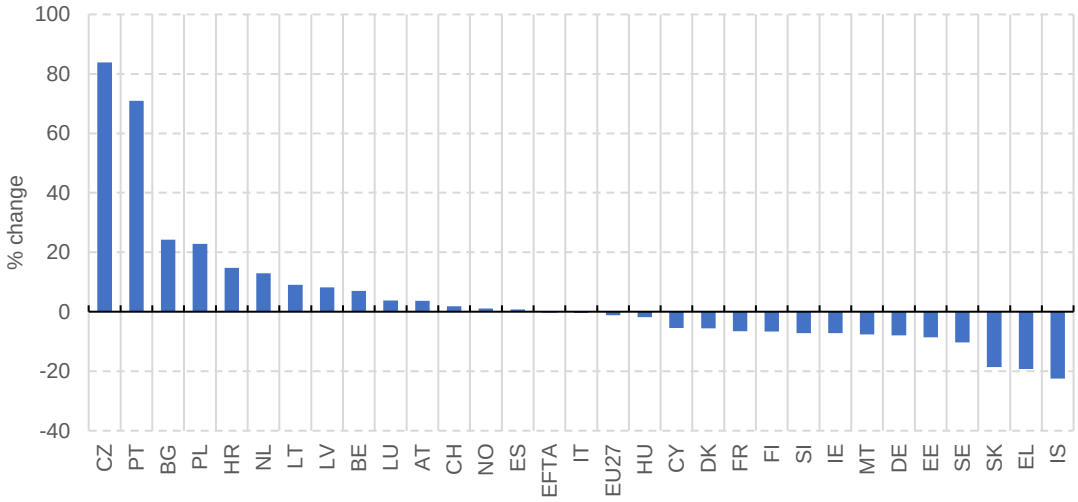
For the smaller EU/EFTA countries, inflows of EU-27 mobile citizens make up a significant portion of the population. Luxembourg, Iceland and Malta had the highest inflows compared to their total population.

Figure 19: Inflows of foreign EU and EFTA citizens aged 20-64 to the principal countries of destination



Data on inflows of EU-27 movers are estimated for: CY, EL, IE, MT, PL, PT, based on EU-LFS data; for DE, based on national data (Wanderungsstatistik); for FR and HR, based on immigration data for all ages.
Source: Eurostat, international migration statistics [migr_emi1ctz, migr_imm1ctz], Milieu calculations.

Figure 20: Percentage change in inflows of EU movers aged 20-64, by country of destination, 2018-2019



Aggregate: EU-27
Data on inflows of EU-27 movers are estimated for: CY, EL, IE, MT, PL, PT, based on EU-LFS data; for DE, based on national data (Wanderungsstatistik); for FR and HR, based on immigration data for all ages.
Inflows: provisional data for BG (2014-2019), PL (2014-2018) and SK (2014-2018). Estimated numbers for DE (2014-2015, 2017-2019), PL (2016-2019), RO (2015, 2017-2019). Break in time series for DE (2016-2019).

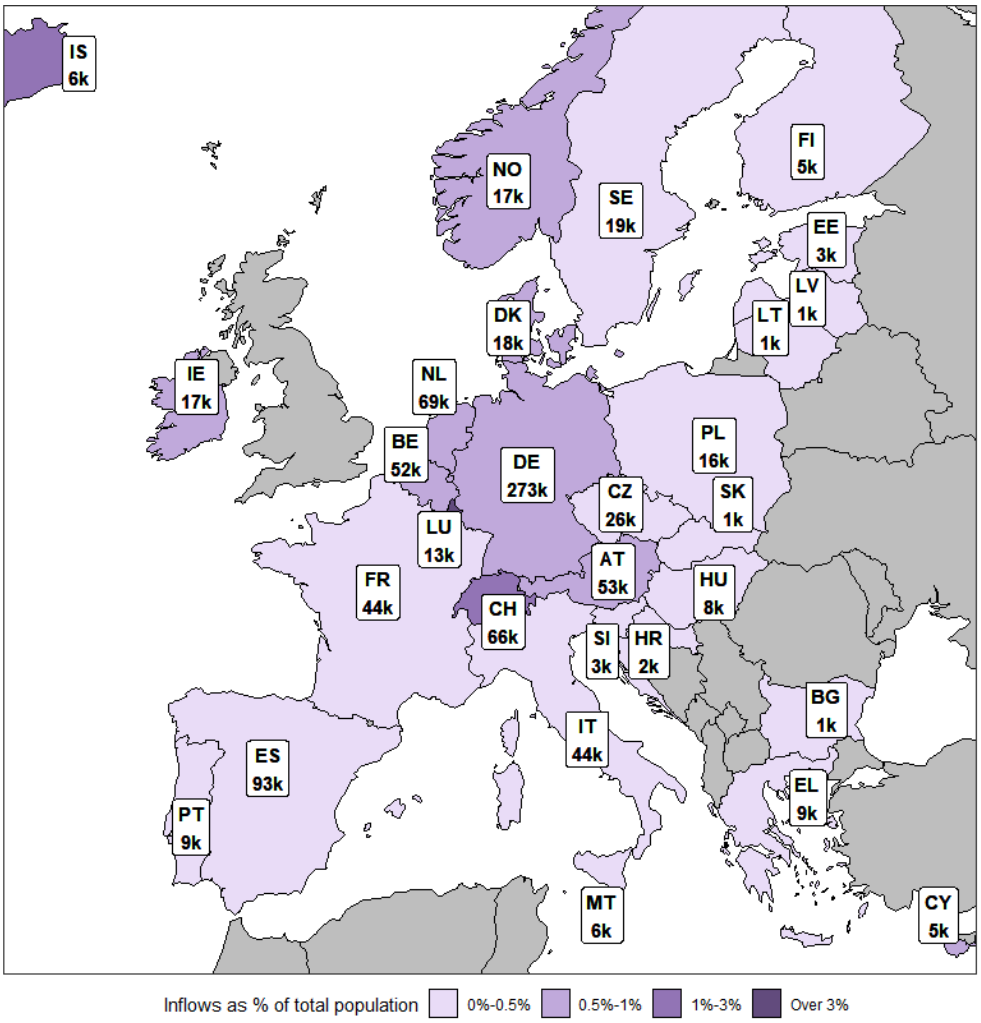
Source: Eurostat, international migration statistics [migr_emi1ctz, migr_imm1ctz], Milieu calculations.

Among the smaller countries of destination, Czechia and Portugal saw large increases of inflows of working age EU-27 movers compared to 2018 (Figure 20). Some traditional sending countries saw quite large percentage increases in inflows of EU-27 movers,

particularly Bulgaria, Poland and Croatia. However, absolute numbers were low (+3 000 in Poland, and less in the other countries).

Inflows of EU-27 working-age movers to other Member States were concentrated in Western European countries: 35 % to Germany, 12 % to Spain, 9 % to the Netherlands, 7 % to each of Austria and Belgium, and 6 % to France and Italy. Almost 50 % of the EU-27 movers went to Germany or Spain. This continues trends seen in recent years of Austria, Belgium and the Netherlands gaining importance as destination countries and France and Italy reducing in attractiveness as destination countries. Czechia and Poland were the only two EU-13 countries which attracted more than 10 000 EU-27 movers in 2019 (Figure 21).

Figure 21: Inflows to EU and EFTA Member States of EU movers, aged 20-64, 2019



Aggregate: EU-27
Data on inflows of EU-27 working age movers are estimated for: CY, EL, IE, MT, PL, PT, based on EU-LFS data; for DE, based on national data (Wanderungsstatistik); for FR and HR, based on immigration data for all ages.
Inflows: provisional data for BG (2014-2019), PL (2014-2018) and SK (2014-2018). Estimated numbers for DE (2014-2015, 2017-2019), PL (2016-2019), RO (2015, 2017-2019). Break in time series for DE (2016-2019).
Population data: provisional data for PL (2013-2019) and FR (2018). Estimated numbers for PL (2016-2018). Break in time series for EE (2015), FR (2014) and LU (2017).
Source: Eurostat, international migration statistics [migr_emi1ctz, migr_imm1ctz], Milieu calculations.

1.2.3. Outflows

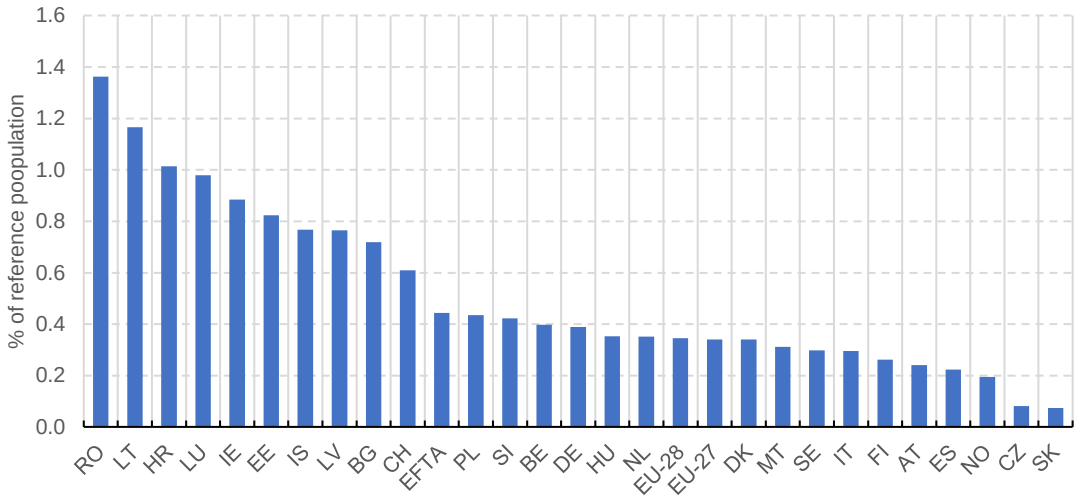
Around 818 000 EU-27 citizens of working age left their country of citizenship in 2019, a 1.1 % decrease on 2018 and continuing the declining trend since 2017. Germany overtook Romania in 2019 as the leading country for outflows of their own citizens, with 165 000 leaving, compared to 159 000 from Romania (Table 6). Other countries with at least 50 000 of their citizens leaving in 2019 were Poland, Italy and Spain. Compared to 2018, however, outflows only increased from Germany and Italy. Figures from recent years suggest that outflows of citizens from some traditional sending countries may be slowing. Flows of Polish citizens leaving Poland began falling in 2017 and flows of Romanians leaving Romania in 2018. In Spain, outflows began to decrease in 2016. Outflows of Italian citizens continue to rise, with annual outflows more than doubling since the beginning of the decade in 2011. Outflows of German citizens from Germany have also doubled since 2011.

Table 6: Outflows from principal sending countries of EU movers aged 20-64, 2018-2019[60]

	Outflow of nationals (thousands), 2019	Annual percentage change
EU-27	818	-1.1
DE	165	2.6
RO	159	-2.9
PL	102	-4.1
IT	94	5.5
ES	56	-0.7

Aggregate: EU-27
Countries with outflows of nationals of more than 50 000 in 2019.
Provisional data for PL (2017-2019). Estimated numbers for DE (2014-2015, 2017-2019), PL (2017-2019), RO (2017-2019). Break in time series for DE (2016-2017, 2019).
Data for CZ, EL, FR, PT not available by age group/citizenship.
Source: Eurostat, international migration statistics [migr_emi1ctz], Milieu calculations.

Figure 22: Outflow rate of nationals aged 20-64, by country of citizenship, 2019



Provisional data for PL (2017-2019). Estimated numbers for DE (2014-2015, 2017-2019), PL (2017-2019), RO (2017-2019). Break in time series for DE (2016-2017, 2019).

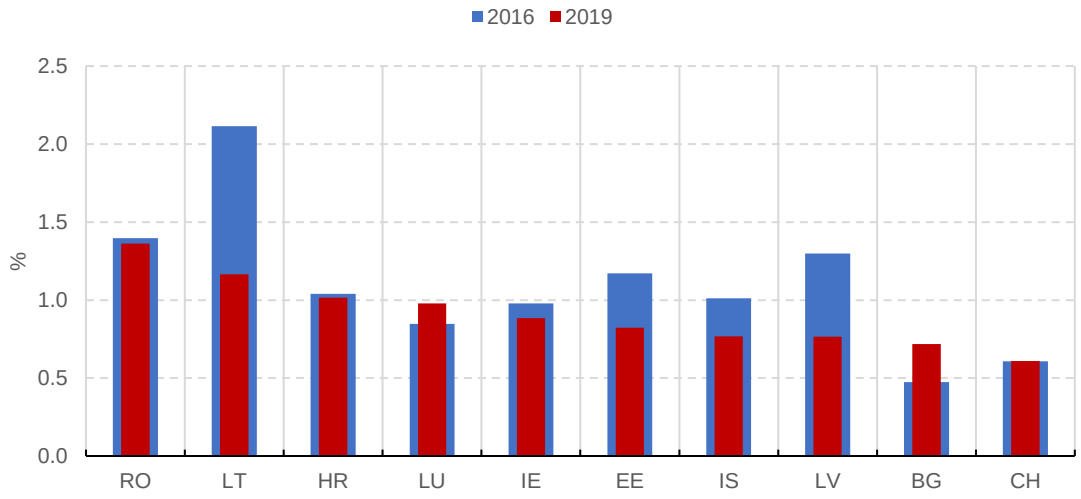
[60] Outflow data by nationality refer to flows towards both EU and non-EU countries. Due to data limitations, it is not possible to have data by nationality only on outflows towards EU countries.

Data for CZ, EL, FR, PT not available by age group/citizenship.
Source: Eurostat, international migration statistics [migr_emi1ctz], Milieu calculations.

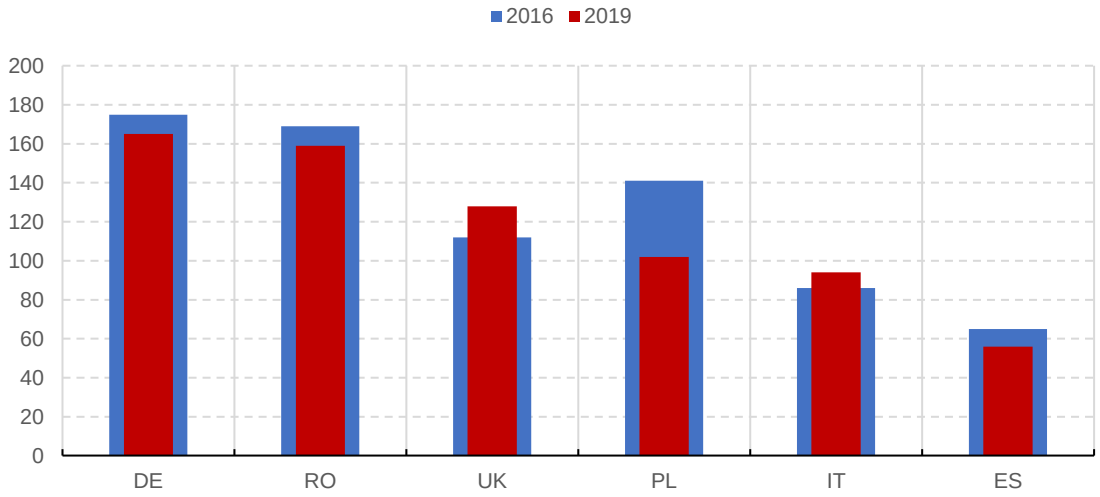
Figure 22 shows the rate of outflows of nationals as a proportion of the country's population and Figure 23A the longer-term trend for the countries with the highest outflow rates (see Table A 10 in the Annex for these trends in absolute numbers). In 2019 Romania was the Member State with the highest proportion of its working population leaving (1.3 %), a minor decrease compared to 2018 and 2017. In Lithuania there was a small decrease in outflows in 2019, following a large decrease the previous year. Several of the other countries with comparatively high outflow rates saw a decrease in recent years: Croatia (since 2018), Ireland (since 2016), Iceland (since 2016) and Latvia (since 2017). Given the relatively small population size of these countries (except Romania), outflows in absolute numbers from these countries were rather small (less than 25 000).

Figure 23: Outflow rate of nationals aged 20-64, for selected countries of origin 2016 and 2019

A. Shares



B. Absolute numbers



Outflow rate is calculated as outflows of nationals from all nationals in the country.
Provisional data for PL (2017-2019). Estimated numbers for DE (2014-2015, 2017-2019), PL (2017-2019), RO (2017-2019). Break in time series for DE (2016-2017, 2019).

Data for CZ, EL, FR, PT not available by age group/citizenship.

Source: Eurostat, international migration statistics [migr_emi1ctz], Milieu calculations.

Figure 23B shows the situation compared to 2016 for the countries with the highest numbers of outflows of nationals. The largest outflows in 2019 were in Germany and Romania, followed by Poland, Italy and Spain. It should be noted that in Romania, return mobility greatly increased in the past years (see Chapter 4), which is why in terms of net outflows it is only the fourth largest country.

In terms of regional distribution, outflows of nationals are more distributed across the countries and EU-14 countries are just as important as EU-13 countries. The main destination countries are still all EU-14 countries. Among EU-13, only Czechia attracts a considerable number of EU movers. However, it must be pointed out again that data on outflows also includes nationals (i.e. citizens of the respective EU countries) moving to third countries. Shares of nationals moving to non-EU countries are considerable.

1.2.4. Return mobility

Return mobility[61] constitutes an important part of intra-EU mobility. In the EU-27, the total number of working age returnees in 2019 was 721 000, up 6 % from the previous year (Table 7). Inflows of nationals to EU countries have consistently increased since 2015, as shown in Table 7.

Table 7: Return mobility of nationals aged 20-64, 2016-2019

	2016	2017	2018	2019
EU-27		655 222	677 502	720 915
ANNUAL Δ			3 %	6 %
EU-28	663 522	722 558	738 470	793 411
ANNUAL Δ	6.6 %	8.9 %	2.2 %	7.4 %
EU-13	240 325	267 849	256 638	277 862
ANNUAL Δ	5.2 %	11.5 %	-4.2 %	8.3 %
EU-14		387 373	420 864	443 053
ANNUAL Δ			8.6 %	5.3 %

Figures refer to inflows of nationals from EU member states and from third countries.
Data on inflows of EU-27 movers are estimated for: CY, EL, IE, MT, PL, PT, based on EU-LFS data; for DE, based on national data (Wanderungsstatistik); for FR and HR, based on immigration data for all ages.
Inflows: provisional data for BG (2014-2019), PL (2014-2018) and SK (2014-2018). estimated numbers for DE (2014-2015, 2017-2019), PL (2016-2019), RO (2015, 2017-2019). break in time series for DE (2016-2019).

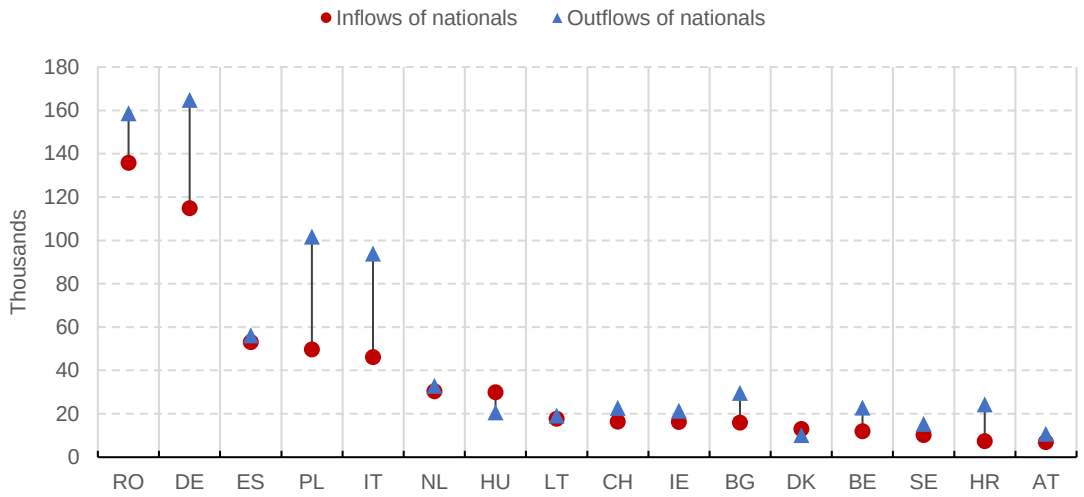
Source: Eurostat, international migration and population statistics [migr_imm1ctz, migr_pop1ctz], MILIEU calculations.

Figure 24 presents an overview of the inflows and outflows of nationals per EU/EFTA country. This shows, firstly, that the two countries with the highest outflows of nationals (Germany and Romania) also had the largest inflows of nationals. Few countries had higher inflows of nationals than outflows. In the long term, outflows must be higher than inflows

[61] Since data by citizenship and next/previous country of residence are not available, returnees are proxied by persons moving into the country of their citizenship, having previously lived abroad. This means that movers may have been previously resident either in other Member States, or in third countries.

because some of those people that have left will stay abroad. In Italy and Poland, where total outflows of nationals were also very high, the inflows made up only half of the outflows.

Figure 24: Inflows and outflows of nationals aged 20-64 in EU and EFTA countries, 2019

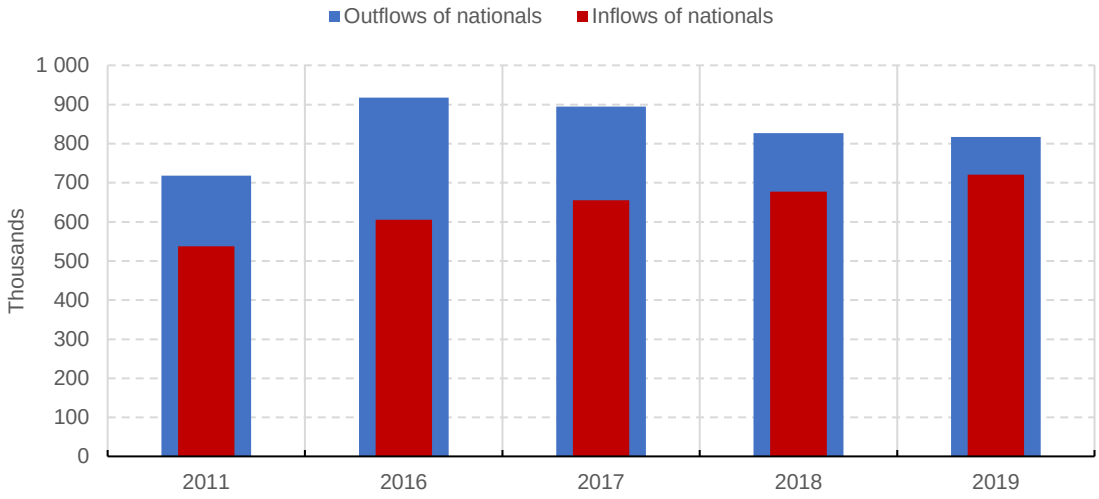


Inflows: provisional data for BG (2014-2019), PL (2014-2018) and SK (2014-2018). Estimated numbers for DE (2014-2015, 2017-2019), PL (2016-2019), RO (2015, 2017-2019). Break in time series for DE (2016-2019). Outflows: provisional data for PL (2017-2019). Estimated numbers for DE (2014-2015, 2017-2019), PL (2017-2019), RO (2017-2019). Break in time series for DE (2016-2017, 2019).

Source: Eurostat, international migration statistics [migr_emi1ctz; migr_imm1ctz], Milieu calculations.

On an EU-level, outflows are consistently larger than inflows over time. However, the gap between the two flows has narrowed due to a combination of lower outflows and increasing returns, as seen in Figure 25**.**

Figure 25: Inflows and outflows of nationals aged 20-64 in the EU



Source: Eurostat, international migration statistics [migr_emi1ctz; migr_imm1ctz], Milieu calculations.

1.3. Labour mobility to and from the United Kingdom

On 31 January 2020, the UK withdrew from the EU. However, by virtue of the transitional provisions of the EU-UK Withdrawal Agreement EU law continued to apply in the UK until 31 December 2020. This agreement allowed citizens and their family members who fulfil certain conditions to retain the right to continue to live, study, work and move freely between the UK and the EU. As of 1 January 2021, mobile persons between the UK and the EU who are not beneficiaries of the Withdrawal Agreement must comply with rules for third-country nationals in the EU Member State and in the UK. As a result, UK nationals will have to follow the Schengen Borders Code (they can spend 90 days in the Schengen zone during any 180-day period), and EU citizens have to comply with the UK immigration rules (they can visit up to six months without a visa).

1.3.1. UK movers in the European Union

Data on total numbers of UK movers in the EU based on registry data is at the time of writing available until 1 January 2020, and data on inflows of UK movers to other EU countries only up to 2019. Neither Eurostat nor UK national data sources (International Passenger Survey of the Office for National Statistics) provide more up-to-date figures. The only numbers that are more up to date are from the EU-LFS; however, the EU-LFS systematically underestimates numbers of movers and, furthermore, for 2020, unreliability of German LFS data has been acknowledged (see Methodological Notes in the Introduction). Therefore, this section focuses on Eurostat's population and migration statistics, as well as on data on acquisition of citizenship until 1 January 2020.

There were around 554 000 UK citizens of working age population in the other EU Member States on 1 January 2020, compared to 548 000 in 2019, 551 000, in 2018, and 555 000 in 2017 (Table 8). They represented around two thirds of the total population of UK citizens in EU-27 countries. The majority of this working age population is concentrated in a few Member States. Spain accounted for more than 28 % of the UK citizens of working age population living in one of the EU-27 Member States in 2020, followed by France (16 %), Ireland (15 %), and Germany (11 %).

In all Member States for which 2020 data are available, the share of working-age UK citizens in the total working-age population was equal to or below 0.5 % except in Ireland and Luxembourg where it represented 2.6 % and 0.9 % respectively. This share is low despite it having increased in several EU Member States during the past decade.

Table 8: Population of UK citizens aged 15-64 living in other EU Member States, 2011-2020

Member State	2011 (1000s)	2016 (1000s)	2017 (1000s)	2018 (1000s)	2019 (1000s)	2020 (1000s)	Trend
EU-27			555	551	548	554	
Austria		7	8	8	8	8	
Belgium	18	16	16	15	14	13	
Bulgaria	2	2	2	2	2	2	
Croatia			0	0	1	1	
Cyprus							
Czechia	4	5	5	6	6	7	
Denmark	12	13	14	14	15	15	
Estonia	0	0	1	1	1	1	
Finland	3	4	4	4	4	4	
France	0	0	98	98	90	90	
Germany	0	75	75	72	69	60	
Greece	0	0	11	11	11	10	
Hungary	2	2	2	3	3	3	
Ireland	82	0	76	77	78	80	
Italy	18	19	19	20	20	21	
Latvia	0	0	0	0	0	0	
Lithuania	0	0	0	0	0	1	
Luxembourg	0	0	4	4	4	4	
Malta	0	0	0	0	0	0	
Netherlands	34	35	36	36	37	38	
Poland	0	0	2	2	2	2	
Portugal	11	9	10	12	15	20	
Romania	0	2	2	2	2	3	
Slovakia	2	1	1	2	2	2	
Slovenia	0	0	0	0	0	0	
Spain	190	156	152	148	149	157	
Sweden	14	16	16	16	16	13	

Eurostat data on the population of UK citizens by age group are not available for all the EU Member States. However, the missing data for some countries can be imputed using the share of the working age population of UK citizens in the total population of UK citizens in all EU Member States in which these data are available. This share is then applied to the total population of UK citizens in the different countries where these data are not available.

Source: Eurostat, population statistics [migr_pop1ctz]

The above figures suggest that the impact of Brexit on the UK working-age population in most EU Member States has been rather limited so far. To avoid potential negative consequences of Brexit, UK citizens living in the EU-27 could have applied for citizenship of one of the EU-27 Member States and indeed, over the past years, there has been a growing number of UK citizens who have acquired citizenship of another EU Member State (see Table A 5 in Annex). New citizenships granted to UK citizens by EU-27 Member States almost doubled between 2018 and 2019, reaching almost 30 000 during that year. An increase of EU-27 citizenships granted to UK citizens was already visible in 2016 with 6 700 cases, whereas in the first half of the last decade, new citizenships granted to the UK citizens remained below 3 000 per year.

Internationally comparable data from Eurostat on the acquisition of citizenship by age group are not available for all EU Member States. But in the countries for which these data are available, the share of working-age UK citizens who acquired the citizenship of an EU-27 Member State accounted for more than two thirds of all citizenships gained by UK citizens in 2019. This share was particularly high in Sweden, Finland, Slovakia, Luxembourg and Poland where it exceeded 80 %.

Table 9: Inflows of UK citizens of all ages to other EU Member States, 2011-2019

	2011	2016	2017	2018	2019	Trend
EU-27	28 408	45 841	47 863	51 151	59 912	
AT	816	1 040	1 039	1 148	1 240	
BE	1 863	1 585	1 576	1 790	2 079	
BG		293	132	302	306	
CZ	316	757	515	583	1 924	
DK	1 064	1 607	1 746	1 619	1 542	
EE		111	168	177	195	
ES	15 735	18 549	21 247	23 962	29 363	
FI	344	378	324	469	494	
FR		11 568	10 002	9 288	8 696	
HR	50	105	100	134	196	
HU	395	435	509	498	587	
IT	1 591	1 712	1 964	2 061	3 461	
LT	24	48	59	64	114	
LU	427	457	554	584	629	
LV			56	52	52	
NL	3 511	5 023	5 527	5 987	6 900	
RO	238	20	88	60		
SE	1 804	1 934	2 048	2 110	1 854	
SI	77	89	100	127	109	
SK	153	130	109	136	171	

EU aggregate is based on the sum of Member States for which data are available – therefore the aggregate is not complete.

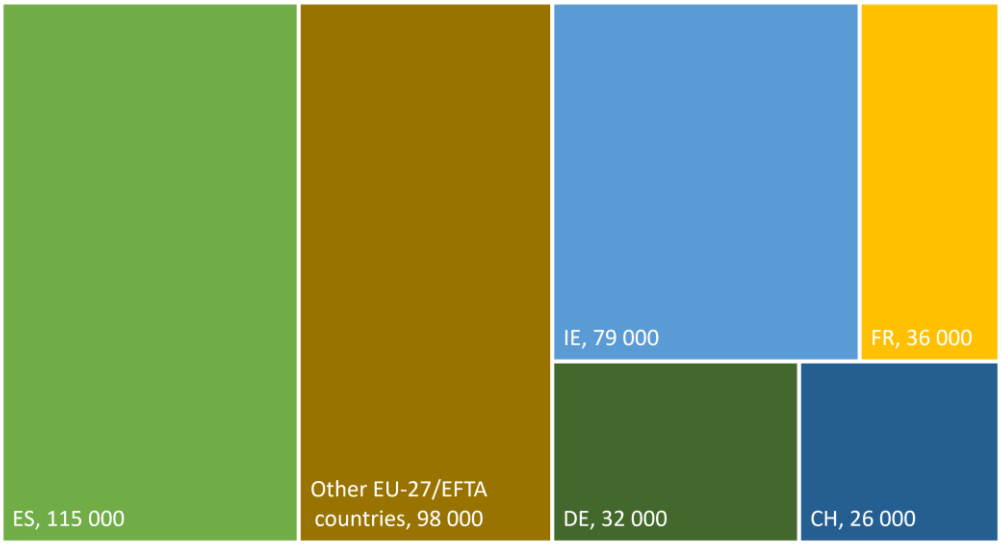
Source: Eurostat, international migration statistics [migr_imm1ctz]

Other than acquiring citizenship of an EU country, UK citizens may work in an EU country after 1 January 2021 under the terms of the Withdrawal Agreement. If they were residing in an EU Member State according to EU law before that date, their rights to work are protected as long as they carry on residing in that EU Member State according to EU law. These rights also apply to UK citizens who started to work in an EU Member State and continue to work in that Member State after that date. All other UK citizens who were not exercising free movement rights in the European Union before 1 January 2021 will need a work permit to work in most EU-27 Member States. Work permits granted to UK citizens wishing to work in these countries will be reflected in future data provided by Eurostat.

In the meantime, the analysis of long-term migration flows of UK citizens to one of the EU-27 Member States over recent years provides some insight into the socioeconomic impact of Brexit on UK mobile citizens. This data does not, however, show a decline in flows of UK citizens to other EU Member States during the past decade. Inflows of UK citizens have grown in many EU Member States for which data are available. Among host countries, Spain accounts for the largest inflows of British citizens, especially during the most recent years. Data on the flows of UK citizens moving to other EU Member States reveal that 70-75 % of these mobile citizens are aged 15 to 64.

According to EU-LFS annual average data for 2020, there were 390 000 UK citizens of working age living in an EU-27/EFTA country, about one quarter of whom were in Spain. Almost one fifth lived in Ireland. Further important countries of residence were France, Germany and Switzerland Figure 26.

Figure 26: Distribution of UK movers aged 20-64 across EU and EFTA countries, 2020



EU aggregate: EU-27
Source: Eurostat, EU-LFS, specific extractions, Milieu calculations.

The number of UK citizens living in the EU-27 has declined by around 100 000 persons, or 20 %, compared to 2011 (Table 10). The decline was already visible in 2013, and some of the decline may be accounted for by UK citizens that are now citizens of the EU country where they are living. In 2016, a bigger drop than in other years can be seen, after a small increase in 2015. Looking at the main countries of residence shows that there is no clear trend across and even within countries. Following the Brexit vote in June 2016, numbers dropped significantly in Spain, but then grew again in 2019 and 2020. These increases may reflect UK citizens who wanted to have a residence in Spain before the UK ceased to be an EU Member State. Ireland saw comparatively small changes in its British population and here also, no clear trend is visible. In France, numbers have declined since 2012, except for in 2014 and 2015.

Table 10: Year-on-year changes in UK movers aged 20-64 in principal countries of residence, 2011-2020

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Trend
Working-age UK movers in EU-27 and main countries of residence (thousands)											
EU-27	483	492	462	447	463	426	432	418	399	386	
ES	134	136	118	105	121	100	94	93	104	115	
IE	80	80	76	75	74	73	77	80	79	79	
FR	78	77	68	77	78	65	60	52	42	36	
CH	25	26	26	26	25	25	24	25	26	26	
Changes in stocks compared to previous reference year (%)											
EU-27		2	-6	-3	4	-8	1	-3	-4	-3	
ES		1	-13	-11	16	-18	-6	-1	13	10	
IE		0	-5	-1	-2	-1	5	4	-1	0	
FR		-1	-13	15	1	-17	-8	-13	-19	-13	
CH		2	1	-1	-2	-1	-4	4	4	-2	

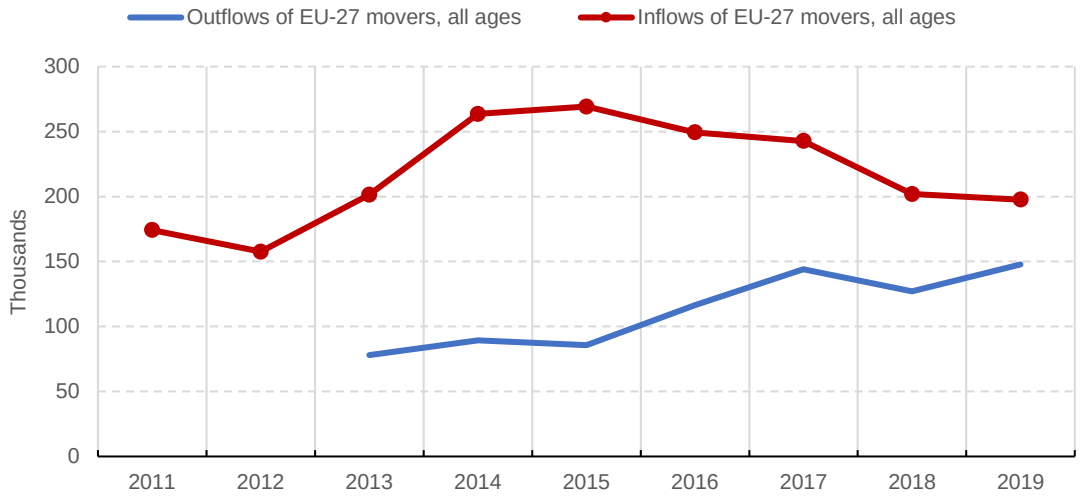
Source: Eurostat, EU-LFS [LFSA_PGANWS] and specific extractions, Milieu calculations

1.3.2. EU movers in the UK

Eurostat statistics on stocks of EU-27 movers living in the UK and on flows of EU-27 moving to or away from the UK are only available until 2019.

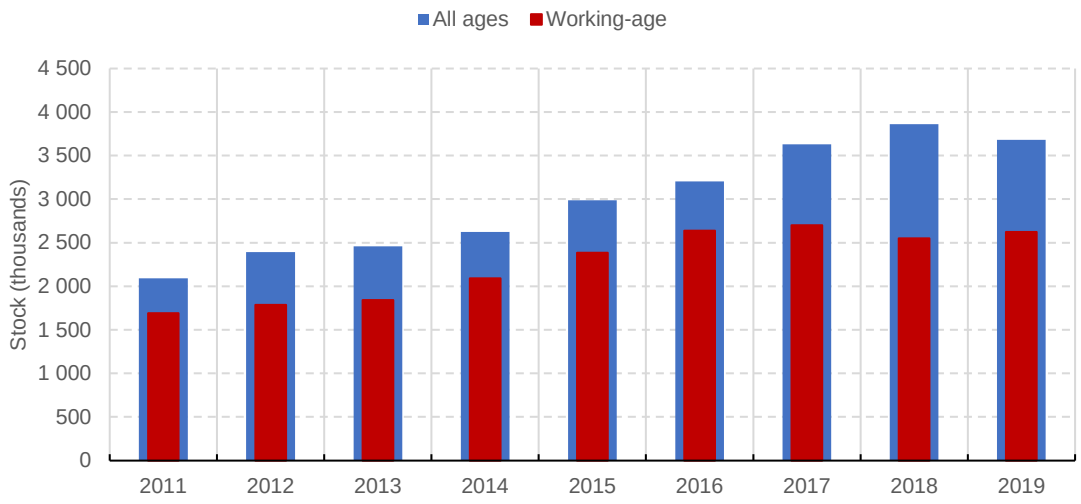
According to the EU-LFS, there were 2.6 million EU citizens of working age living in the UK in 2019. By far the largest group were Polish citizens (646 000), followed by Romanians (338 000), Italians (207 000), Irish (182 000), Spanish (134 000) and Germans (111 000), among the nationalities counting more than 100 000 movers.

Figure 27: Inflows to and outflows from the UK of EU movers, 2011-2019



Source: Eurostat, international migration statistics [migr_imm1ctz]; population statistics [migr_pop1ctz]; EU-LFS [LFSA_PGANWS], Milieu calculations

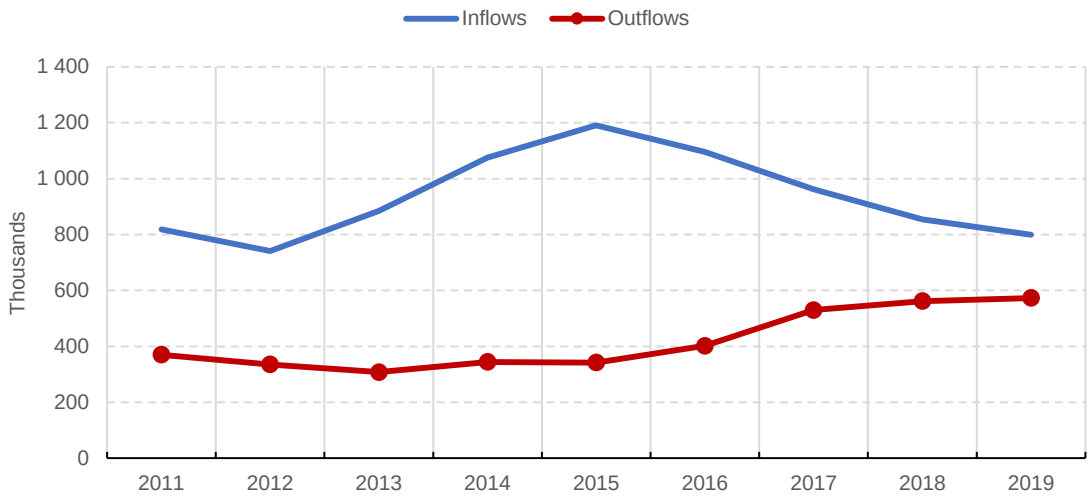
Figure 28: Stocks of EU movers in the UK, by age group, 2011-2019



Working age = 20-64 years
Source: Eurostat, population statistics [migr_pop1ctz]

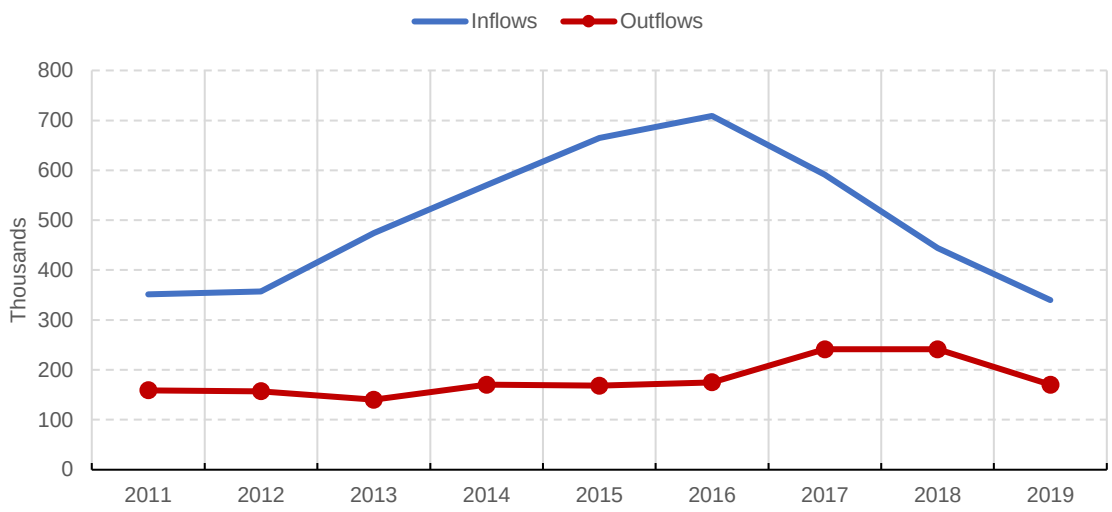
Figure 27 and Figure 28 show the trend of year-on-year changes in inflows, outflows and stocks of EU movers to, from and in the UK over the last ten years. They indicate that Brexit may have had an impact on actual and potential EU movers, given that inflows declined annually since 2016, whereas from 2013 to 2015 they increased. Furthermore, outflows increased after 2015. The combination of both has led to a slowing of growth in movers, indicated by both the EU-LFS and Eurostat population statistics. According to the LFS, growth in stocks was smaller than in the previous decade in 2017-2019 and according to population data, growth decreased in 2018 and became negative (for the first time since 2011) in 2019.

Figure 29: Estimates of inflows to and outflows from the UK of EU movers, 2011-2019



Source: ONS, Long-Term International Migration Estimates, 2 series (LTIM calendar year)

Figure 30: Estimates of immigration and emigration to the UK of EU movers for work-related reasons, 2011-2019



Source: ONS, Long-Term International Migration Estimates, 2 series (LTIM calendar year)

Figure 30 suggests that Brexit may have impacted to a further extent decisions of potential EU mobile citizens to move to the UK for work-related reasons. The drop in estimates of flows to the UK for work-related reasons is steeper than the drop in general estimates of flows to the UK.

Examining the long-term migration flows of citizens of one of the 27 EU Member States to the UK in recent years may also shed light on the socioeconomic impact of Brexit on EU migrants. Estimates from the UK Office for National Statistics show a clear decline in the inflows of EU movers to the UK from 2016 after a long upward trend in recent decades (Figure 29 shows the trend since 2011). Outflows of citizens originating from one of the 27 EU Member States show a slight increase over the recent years. These developments suggest that the Brexit referendum in 2016 has probably had a negative impact on the inflows and outflows of EU citizens to the UK.

Table 11: Emigration and immigration for permanent residence from and to Poland with Germany and the UK, 2010, 2014 and 2019

	2010	2014	2019	Trend
Flows between Poland and the UK				
Outflows from PL to UK	3 472	7 392	2 383	
Inflows from UK to PL	4 409	2 944	4 015	
Flows between Poland and Germany				
Outflows from PL to DE	6 818	10 266	3 846	
Inflows from DE to PL	2 677	2 358	2 507	

Source: Statistics Poland GUS (Glowny Urzad Statystyczny) Statistical Analysis, 'Demographic situation in Poland up to 2019; international migration of population in 2000-2019´, Table 6 ´The main directions of emigration for permanent residence in selected years´ and table 16 ´Immigration for permanent residence by selected countries of previous residence`.

The development in flows between the UK and some of the main countries of origin of EU movers is shown in Table 11 and Data on outflows from Spain and Italy towards the UK is not available by citizenship, so the outflow numbers may include British returnees, particularly in the case of Spain. This might explain the sharp increase in outflows from Spain in 2017, when there was a notable decrease in outflows from Italy.

Table 12. Inflows from the UK to Poland and Germany have increased slightly during recent years and outflows to the UK have decreased. The latter is a more pronounced trend for both Poland and Germany. However, outflows from Poland have also decreased towards Germany between 2014 and 2019 to roughly the same extent, thus making it difficult to draw a clear link with Brexit. For Germany, the decrease in outward mobility towards the UK decreased quite markedly in 2017 and then further in 2020.

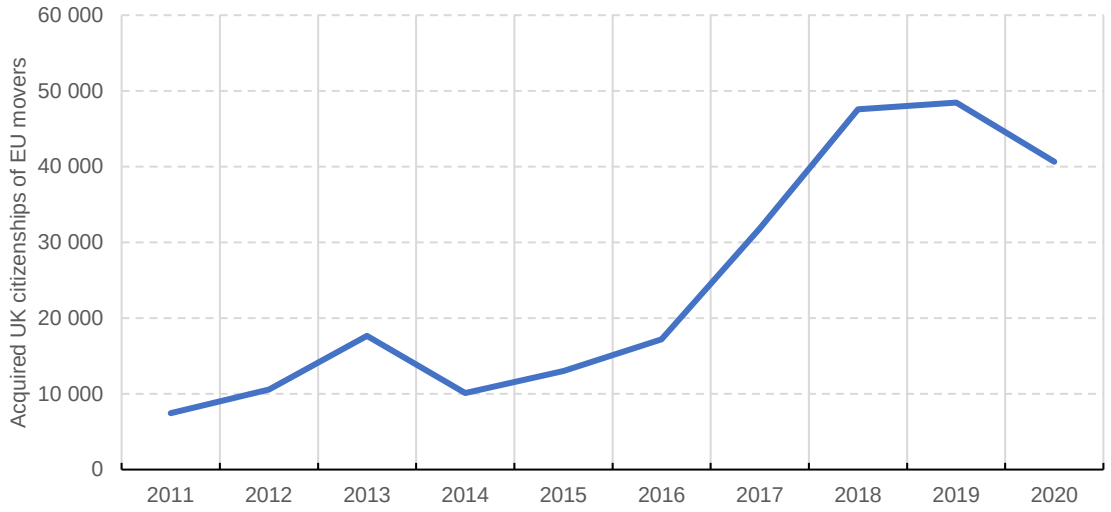
Data on outflows from Spain and Italy towards the UK is not available by citizenship, so the outflow numbers may include British returnees, particularly in the case of Spain. This might explain the sharp increase in outflows from Spain in 2017, when there was a notable decrease in outflows from Italy.

Table 12: Migration flows between the UK and selected EU countries, 2011-2020

	2011	2016	2017	2018	2019	2020	Trend
Outflows from Spain and Italy to the UK							
Outflows from Spain to the UK	17 588	37 129	49 483	40 597			
Outflows from Italy to the UK	6 148	26 812	22 480	22 428			
Flows between the UK and Germany							
Inflows to Germany from the UK	6 487	6 526	6 583	6 418	6 385	6 068	
Outflows from Germany to the UK	8 385	8 243	6 677	7 032	6 766	5 109	

Data on outflows from Spain and Italy are for all nationalities; data for flows between Germany and the UK are for German citizens.
Sources: Eurostat, international migration statistics [migr_emi3nxt]; and German national statistical institute DESTATIS, Genesis database, Table 12711—0008 Wanderungen zwischen Deutschland und dem Ausland: Deutschland, Jahre, Nationalität, Herkunfts-/Zielländer

Figure 31: Acquisition of UK citizenship by EU-27 movers, 2011-2020



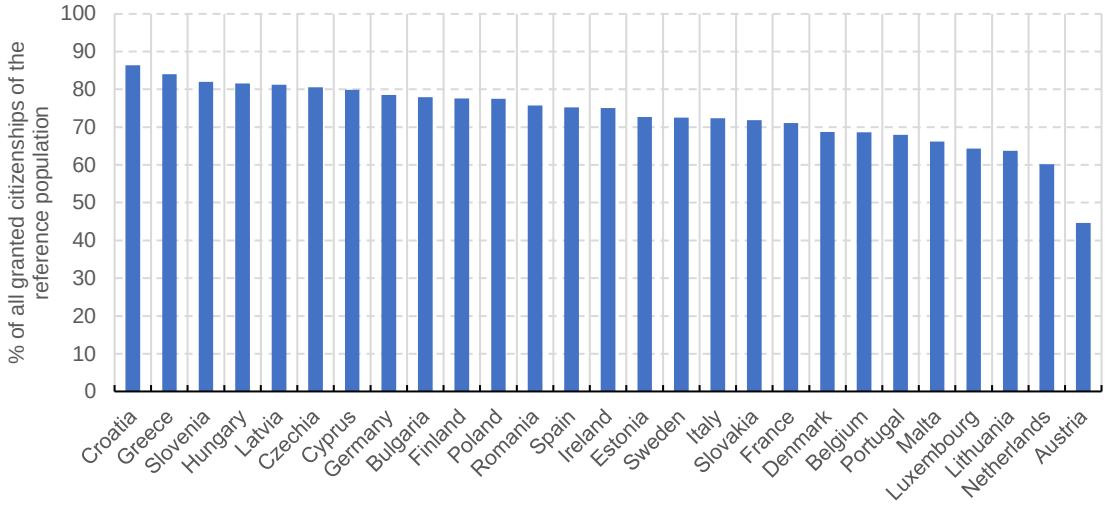
Source: UK Home Office (2020), dataset Cit_D01.

An increasing number of EU citizens were granted UK citizenship during the second half of the past decade (Figure 31). This number jumped from around 17 200 in 2016 to nearly 48 500 in 2019, the latest available year for Eurostat data. The latest data from the UK Home Office shows a drop in the grants of UK citizenship to citizens from EU countries to 41 000 in 2020. Around two thirds of the citizens from EU Member States who had acquired UK nationality in 2020 originated from seven countries: Italy (6 000), Romania (5 500), Poland (5 400), France (3 500), Germany (3 200), Bulgaria (2 900), and Spain (2 600). For all these countries but Italy, the number of citizens who acquired UK citizenship followed an

upward trend during most of the second half of the past decade and then declined in the most recent years, notably in 2020.

Data from the UK Home Office reveal that more than three quarters of EU movers granted citizenship during the second half of the past decade were of working age (Figure 32). The share was 75 % in 2020, compared to 78 % in 2019.

Figure 32: Acquisition of UK citizenship by EU nationals aged 18-69, 2020



Source: UK Home Office (2020), dataset Cit_D01.

2. Mobility of workers

This chapter provides an overview of recent trends in the mobility of active EU movers[62] in EU and EFTA countries. The first section examines developments in inactive and active movers over the latest years. The evolution of the stocks of active and inactive EU movers in EU and EFTA countries is examined, while providing insights on their countries of destination and origin. The section then focuses on those EU movers who arrived in destination countries within the past two years to better comprehend their activity status and skill levels. The second section focuses on the economic integration of active EU movers[63]. It examines their labour market participation and performance in the destination countries over the recent years as well as some of their socioeconomic and demographic characteristics that are likely to impact their labour market situation. Moreover, the section sheds light on the economic integration of certain categories of mobile workers, namely the self-employed and the cross-border workers.

Key findings

Overall trend

- **For the first time since 2012, the number of active EU movers decreased during 2020.** This decline was, however, small at 2 % or 177 000 compared to 2019, out of a total 8.7 million movers. The number of active movers went down most in Germany, France, Italy and Spain and is mainly due to decreasing numbers of Romanian and Polish movers, which are down 170 000 and 117 000 compared to 2019.

Performance of EU movers on the labour market

- **In a break with previous trends, and fuelled by the COVID-19 pandemic, the employment rate of mobile EU workers decreased and unemployment rate increased in 2020.** This effect was more strongly felt for movers than for nationals. Compared to 2019, the employment rate of movers fell by 2.6 percentage points to 72.7 %; whereas the employment rate of non-mobile workers, 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 mobile EU 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 service, 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

[62] 'Active' includes employed, self-employed, as well as job-seeking individuals.

[63] The data used for this section are derived from the 2020 wave of the EU-LFS. Due to slightly different methods of data collection and aggregation, the figures may not be fully comparable to the data in Section 1, which are derived from population statistics. The data may also deviate slightly from EU-LFS figures published on Eurostat, due to different types of aggregation.

2020 in sectors such as construction, accommodation and food services, administrative and support services, and activities of households as employers. A contrario, they were underrepresented in the public service sector and agriculture, economic activities traditionally occupied by nationals.

- **EU movers remained overrepresented compared to nationals in lowest skilled occupations but had comparable representativeness in the highest-skilled occupations.** Like in previous years, movers were more involved in low-skilled elementary occupations than nationals in 2020. However, movers were represented in relative similar proportion in the highest-skilled occupations, namely legislators, senior officials and managers. 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.

- **Self-employed movers sharply dropped, accounting for less than a tenth of all EU movers in most destination countries in 2020.** The number of self-employed EU movers fell from around 11 % of all employed in 2019 to 7 % in 2020. This drop was partially due to the exclusion of the UK from long-term intra-EU mobility following Brexit since this country accounted for the largest share of self-employed EU movers in the previous years.

- **The number of workers residing in one EU/EFTA Member State and working in another (i.e. cross-border workers) decreased slightly in 2020.** Compared to 2019, there was a decrease of 3 % to 1.3 million. The two largest destinations are Germany (406 000) and Switzerland (321 000). Most of the 2019-2020 decrease is due to a 16 % decrease in Switzerland.

Demographic characteristics of mobile workers

- **The decrease in the movers' employment rate in 2020 was mirrored in both gender groups to the same extent but the gender gap in unemployment rates widened**. 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 employment gap has remained broadly the same. This implies that the overall gap of 15 percentage remained unchanged from 2019. However, the unemployment rate of females picked at 11 % in 2020 against 9 % in 2019 while that of males increased from 7 % to 8 % during that period.

- **The proportion of EU movers with tertiary education has steadily increased since 2016.** In 2016, 30 % of movers had a high education attainment level, while in 2020 the proportion is 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.

- **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.

2.1. Recent developments

2.1.1. Stocks of active EU-27 movers in 2020

2020 marks a decrease in numbers of all movers, including active ones, the first decrease since 2012. EU-LFS data counts 8.7 million movers in 2020, 180 000 less (-2 %) than in 2019; it counts 7 million active movers, which is 280 000 less (-4 %) than in 2019 (Table 13). When Germany is excluded from the data, the stock of all movers remained constant while that of active ones declined by 2 %[64]. Meanwhile, the number of inactive movers increased in 2020. Table 13 shows the numbers for all movers, active and inactive movers within the EU-27 between 2011 and 2020.

Three developments, which most likely went hand in hand in 2020, can explain these trends: a certain portion of previously active movers have become inactive while remaining in their country of residence; previously active movers have left their country of residence (possibly to return home); newly arriving movers have had a harder time than in previous years to find employment and were therefore more likely to be inactive. These dynamics will be investigated as much as possible in Section 2.2. by looking at the change in labour status among movers. Furthermore, Chapter 3 provides more insight into changes in labour mobility during the COVID-19 crisis.

While the decline in numbers of movers in 2020 – and especially that of active movers – is partly attributable to the COVID-19 crisis, EU-LFS data confirms what has already been found in Chapter 1, namely that growth in intra-EU mobility has already declined since 2016. Thus, to some extent, developments in 2020 may also be a continuation of that downward trend.

Table 13: Stocks of EU movers aged 20-64 years by activity status, 2011-2020

	2011	2016	2017	2018	2019	2020	Trend
All working-age EU-27 movers in EU-27 Member States (thousands)							
All movers	6 532	8 093	8 332	8 659	8 889	8 712	
Active movers	5 193	6 565	6 761	7 063	7 289	7 008	
Inactive movers	1 339	1 529	1 571	1 596	1 600	1 705	
Annual change of all movers (thousands)							
All movers		470	239	327	230	-177	
Active movers		398	197	302	226	-282	
Inactive movers		72	43	25	4	105	
All working-age EU-27 movers in EU-27 Member States, excluding Germany (thousands)							
All movers	4 641	5 214	5 383	5 512	5 687	5 689	
Active movers	3 696	4 187	4 318	4 432	4 588	4 485	
Inactive movers	937	1 025	1 060	1 076	1 092	1 198	

Aggregate: EU-27
Source: Eurostat, EU-LFS [LFSa_pganws] and specific extractions, MILIEU calculations

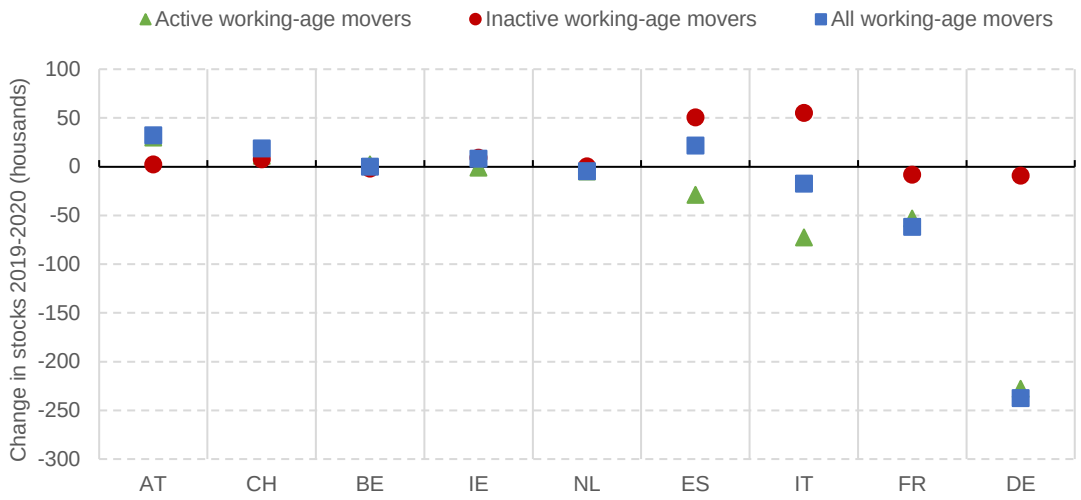
Among the 7.1 million active EU-27 movers, 6.4 million (or 92 %) were born outside their current country of residence, thus had moved at least once during their lifetime. In most countries of destination, the shares of movers who were born outside the country are much larger. Exceptions are Belgium, Germany and Switzerland where the shares are 88 %, 87 %

[64] German data for the EU-LFS for 2020 is of limited reliability due to a break in series. See 'Methodological notes' in the introduction for a detailed explanation.

and 89 %, respectively. The following subsections of Chapter 2 focus on the group of movers born outside their country of residence.

The decline in numbers of active movers in 2020 was largely driven by Germany, France, Italy and Spain, as shown in Figure 33. These are among the largest countries of destination and saw the largest decreases in absolute numbers in 2020. Ireland also saw a decrease, but on a much smaller scale. The decline in Germany must be interpreted with caution – most likely, there was a decrease in growth, but smaller than indicated. Among the main countries of destination, only Austria and Switzerland saw increases in numbers of active movers in 2020. The increase in numbers of inactive movers in 2020 seems to be largely driven by two countries: Spain and Italy. Numbers of inactive movers in these countries increased by over 50 000 persons, while in the other countries they only changed marginally.

Figure 33: Stocks of active movers aged 20-64 in selected EU and EFTA countries



Aggregate: EU-27
Countries selected host more than 200 000 active movers .
Figures exclude movers born in their country of residence.

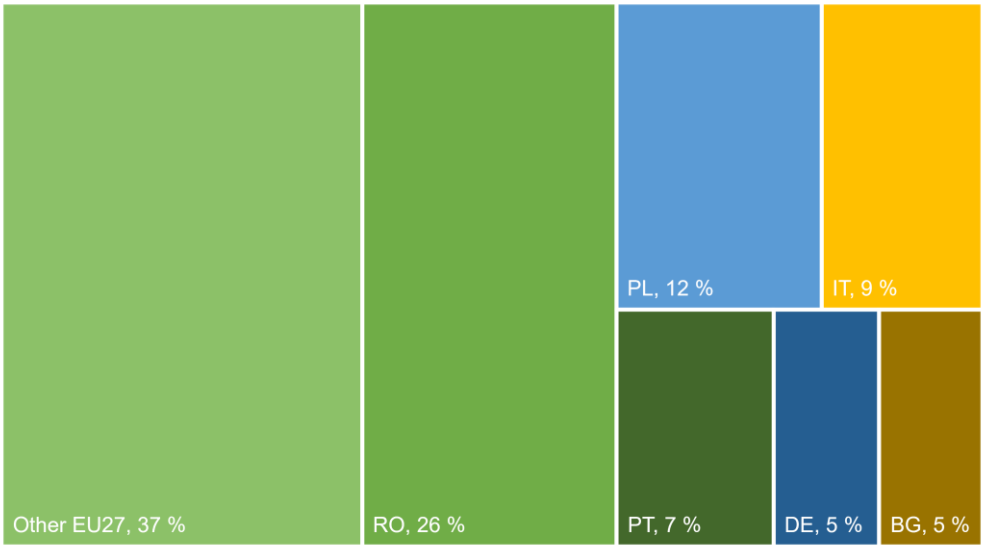
Source: Eurostat, EU-LFS, specific extractions, Milieu calculations.

The combination of the two groups (active and inactive) leads to an overall decline in numbers of movers in Italy, France and Germany, and to a smaller extent in the Netherlands, but not in the other countries.

As at EU level, these developments in 2020 can only partly be attributed to the COVID-19 crisis; they also fit with a longer-term trend in several countries, in particular in Germany, France and Italy. A different situation can be found in Spain, where growth in numbers of EU movers had increased at the beginning of 2020 compared to previous years, with inflows continuously increasing. This is likely to have contributed to the overall increase in numbers of movers in Spain, despite the fact that the country experienced the largest drop in employment rate of all the large destination countries in 2020 (Figure 37).

The situation is also very different in Austria where inflows were steady and growth of stocks quite large between 2016 and the beginning of 2020. During 2020, the COVID-19 crisis did not seem to affect movers' employment greatly (it decreased, but less than the EU average or compared to Germany, Italy and Spain – see Figure 38), which might explain the continued growth in stocks of active movers and all movers in 2020.

Figure 34: 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.

Most common countries of origin for EU-27 active movers have changed little between 2019 and 2020. As noted above, the departure of the UK has slightly reduced the share of Polish movers, due to the high numbers of Polish movers living in the UK. This has reinforced the share of Romanian movers from 23 % to 26 % of all EU-27 active movers (Figure 34).

Table 14: Change in numbers of active movers aged 20-64, principal countries of origin, 2019-2020

	Annual change	Annual percentage change	Annual change excluding DE	Annual percentage change excluding DE
RO	-175	-10	-88	-6
PL	-117	-13	-8	-2
IT	-24	-4	+2	1
PT	-46	-9	-28	-7
DE	-5	-2	-15	-5
BG	-82	-22	-18	-8
EU-27	-103	-2	-94	-2

Figures exclude movers born in their country of residence.

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

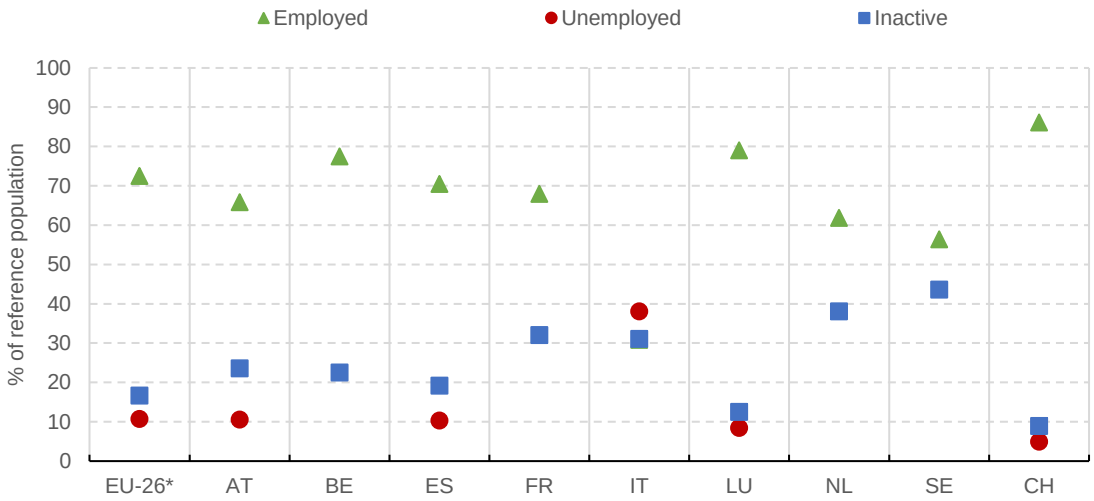
Looking at changes in numbers of active movers from the main countries of origin (Table 14), one can see that for most groups of movers, 2020 marked a decrease in stocks. This is even the case when excluding Germany to avoid any potential distortion.

2.1.2. New movers

New movers are those who arrived within the past two years[65]. In 2020, there were 400 000 new EU movers of working age in the EU-27, of which 300 000 were active. The number of new movers in EU countries excluding Germany[66] was 360 000 in 2020, a 1 % increase on 2019; this is a lower growth than in 2019 when their number increased by 5 %.

At EU level, a higher share of new movers were employed than movers residing longer in their destination country. In 2020, the employment rate of new movers was 73 %, compared to 70 % among all EU movers[67]. Looking at key destination countries, new movers fared better than all movers in Belgium (+ 5 pps) and Spain (+6 pps). However, in others, there are large differences to the detriment of new movers, namely in Austria (-10 pps), Italy (-35 pps) and the Netherlands (-17 pps).

Figure 35: Activity status of new EU movers aged 20-64, by country of residence, 2020



Aggregate: *EU-26 (EU-27 minus Germany)
Countries presented are those for which data are reliable enough for publication. Unemployment data are too low to be published for BE, CY, DK, FR, NL and SE, thus reference is only to total of employed + inactive.
Low reliability for: category 'unemployed': EU-27, at; category 'employed': SE; category 'inactive': BE, CY, DK, FR, SE.

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

The most common occupational group for new movers was 'professionals', as in 2019 (Figure 36). A higher share of new movers are employed in this occupational group than the share of all movers working as professionals. This difference has increased, perhaps in part thanks to better 'teleworkability' of professional occupations during the pandemic[68]. The second largest group was elementary occupations. The share of new movers employed in this group is smaller than the share of all movers employed in this group. One explanation is that elementary occupations were among those hardest-hit by the COVID-19 crisis, not

[65] The time span was chosen to provide a more detailed picture of the employment situation of those who moved recently, while being large enough to increase reliability of data (data on movers who arrived within the past year often underestimates the real number and are often too small for further disaggregation.
[66] Germany was excluded because when included it shows a decrease of 30 %, which is improbable.
[67] EU aggregate excludes Germany as a destination country due to doubts over the reliability of data, for the reasons described in 'Methodological notes' in the introduction.
[68] See Chapter 3 for more discussion of the impact of teleworkability of occupations during the pandemic.

least because they are usually less adaptable to teleworking[69]. New movers may have been less likely to start work or retain a job in such occupations.

Figure 36: New EU movers aged 20-64, by occupation, 2020

Only those occupations are displayed for which data are above reliability limits. 100 % refers to the sum of the occupations displayed.

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

[69] European Commission, 2021, Employment and Social Developments in Europe. 2021 Annual review, p. 70.

2.2. Economic integration

2.2.1. Employment and unemployment trends

In 2020, as Europe struggled with the COVID-19 pandemic, several economic indicators reflected the difficulties induced by restrictions. GDP declined, as did revenues and overall employment, although the decrease in the latter was softened by the implementation of job-retention measures and a strong rebound effect in the second semester.[70]

2020 was the first year since 2013 where the employment rate of either EU mobile workers or non-mobile workers fell. Compared to 2019, the employment rate of movers fell 2.6 pps to 72.7 %; this was larger than the employment rate drop of non-mobile workers, which fell 0.5 pps to 73.3 %[71]. Different from all previous years, this meant that the employment rate for non-mobile workers was higher than for mobile workers.

Table 15 shows the trend in employment and unemployment rates of EU movers and nationals since 2011. The employment rate of both groups had been growing steadily since 2013. Despite the drop in 2020, the employment rate remained well above 2013 levels, when the employment rate of EU movers was 69 % and that of nationals 68 %.

Table 15: Employment rates and unemployment rates for EU movers and nationals aged 20-64, 2011-2020

	2011	2016	2017	2018	2019	2020	Trend
Working-age movers in EU-27 Member States (thousands)							
Employed	4 110	5 406	5 613	5 948	6 201	5 815	
Inactive	1 239	1 411	1 449	1 480	1 484	1 577	
Unemployed	615	642	584	559	546	603	
Working-age nationals in EU-27 Member State (thousands							
Employed	168 893	172 043	173 843	174 970	175 837	173 914	
Inactive	61 465	55 131	53 468	52 205	51 072	51 766	
Unemployed	16 762	15 902	14 099	12 457	11 392	11 671	
Employment rates (%)							
Nationals	68	71	72	73	74	73	
EU-27 movers	69	72	73	74	75	73	
EU-26 movers (excl.Germany)	68	70	71	72	73	70	
Unemployment rates (%)							
Nationals	9	8	8	7	6	6	
EU-27 movers	13	11	9	9	8	9	
EU-26 movers (excl.Germany)	15	13	12	11	10	11	

Aggregate: EU-27; EU-26.
Aggregates exclude movers born in their country of residence.

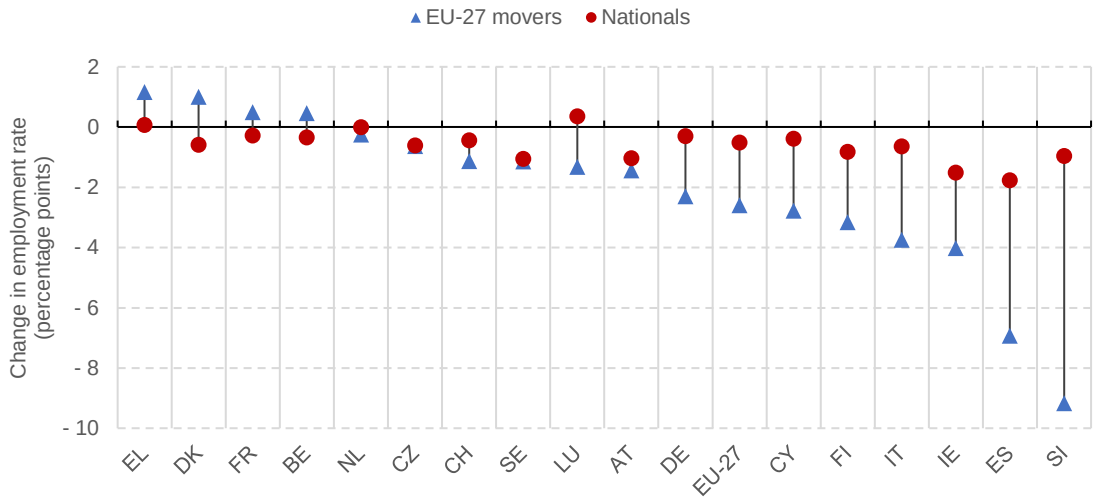
Source: Eurostat, EU-LFS, specific extractions, Milieu calculations.

[70] European Commission, 2021, Employment and Social Developments in Europe. 2021 Annual review, p. 24.

[71] Employment and unemployment rate excluding data from Germany was also calculated and is included in the table. In general, employment rates are lower and unemployment rates higher when Germany is excluded. However, the broad trends since 2011 are largely the same. Therefore, in the remaining section 2.2.1, figures excluding Germany will not be presented separately.

The unemployment rate of EU-27 movers increased by 1 percentage point to 9 % in 2020. Unemployment among nationals remained the same as in 2019 (6 %), slightly increasing the gap to EU-27 movers.

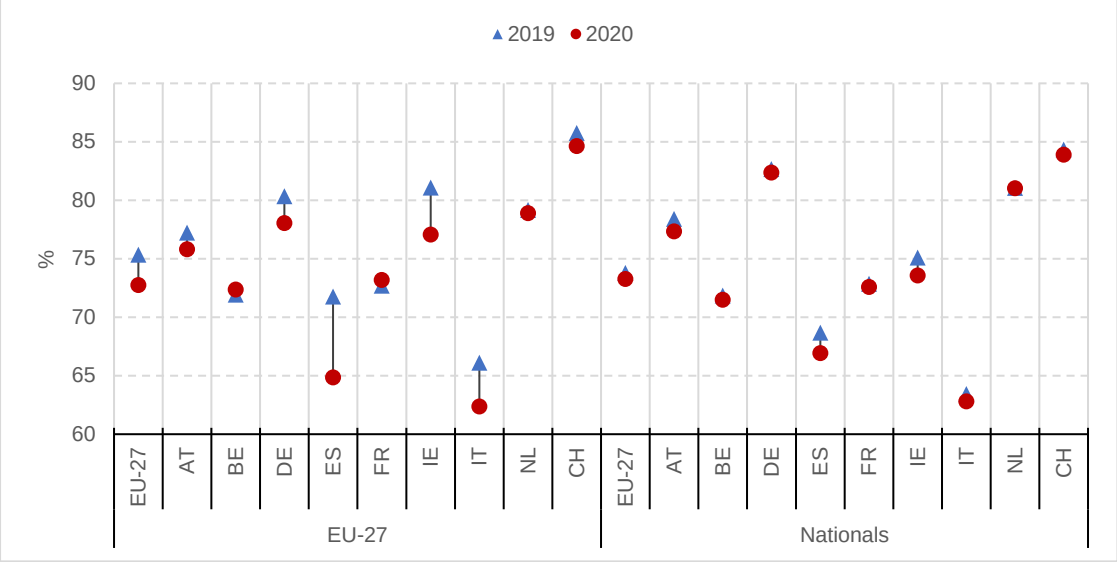
Figure 37: Change in employment rates of EU movers and nationals aged 20-64, 2019-2020



Aggregate: EU-27
Data sorted by change in employment rate of EU-27 movers 2020-2019, in descending order.
Aggregate excludes movers born in their country of residence.

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

Figure 38: Employment rates of EU movers and nationals aged 20-64 in selected EU and EFTA countries, 2019-2020



Totals exclude movers born in their country of residence.
DE EU-LFS data had a break in series in 2020 and comparisons with 2019 have low reliability.

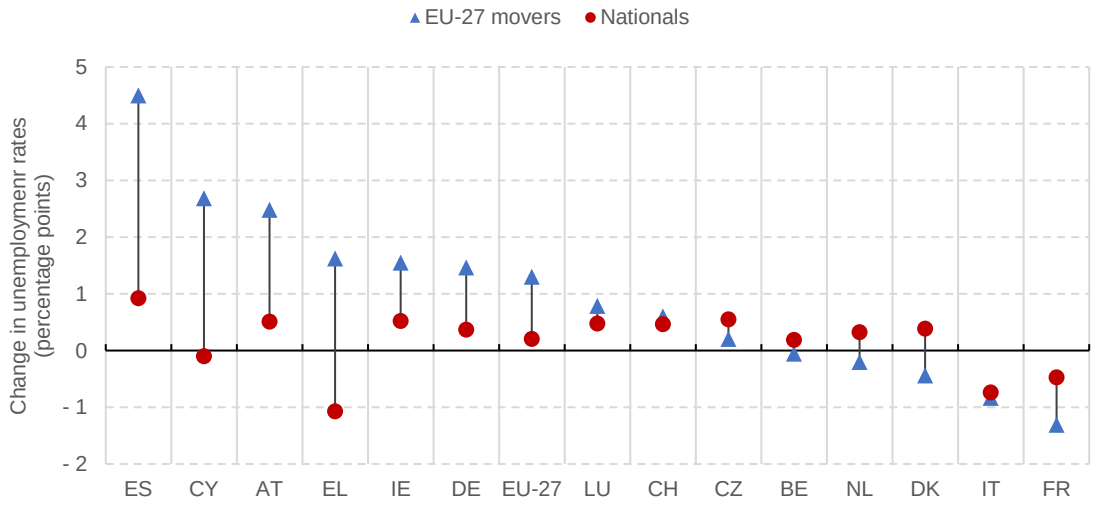
Source: Eurostat, EU-LFS, specific extractions, Milieu calculations.

In some Member States EU movers' employment situation developed more unfavourably than shown in the EU aggregate (Figure 37 to Figure 40). Among the main destination countries, this was especially the case in Italy and Spain. EU-27 movers' employment rate

dropped by 4 pps and 7 pps in Italy and Spain respectively compared to the previous year. In Spain, their unemployment rate increased by 4 pps, while in Italy it decreased slightly. Italy already had the lowest employment rate among EU-27 movers (and nationals) of the nine main destination countries and decreased to 62 % (63 % for nationals) in 2020. Spain had the highest unemployment rate, which increased in 2020 to 20 % among EU-27 movers. The unemployment rate of nationals increased less but still reached 14 % in 2020. The trend pre-2019 was different in the two countries: in Italy, EU-27 movers' employment rates remained at a similar level between 2017 and 2019; in Spain, it increased in that period.

To a smaller extent, such developments were also seen in Germany and Ireland.

Figure 39: Change in unemployment rates of EU-27 movers and nationals between 2019 and 2020



Data sorted by change in unemployment rate of EU-27 movers 2020-2019, in descending order.
DE EU-LFS data had a break in series in 2020 and comparisons with 2019 have low reliability.
Totals exclude movers born in their country of residence.
Only countries are displayed where data were above reliability limits for all three categories of labour status.

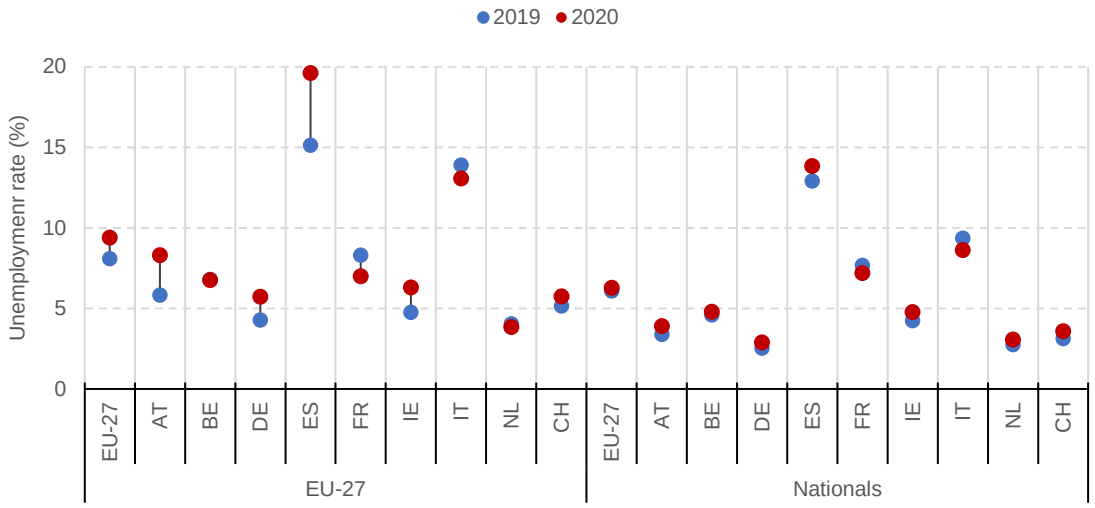
Source: Eurostat, EU-LFS, specific extractions, Milieu calculations.

These decreases in employment were likely related to the COVID-19 crisis, rather than being a continuation of earlier trends. Italy and Spain were the countries with the largest drop in GDP in 2020 among all EU Member States[72]. The strong decrease in the employment rate of movers in Spain was probably linked to the fact that the accommodation and food services sector is the most important sector of employment among EU movers in the country and was particularly affected by the pandemic restrictions.

In some of the major destination countries, movers appear to have been hit harder than nationals. Reasons for this may be the overrepresentation of EU-27 movers in occupations most at risk of being affected by COVID-19 safety measures (accommodation and food services; transport); and in low-skilled occupations where teleworking was difficult. EU movers were also more likely than nationals to be employed on limited contracts, making them more vulnerable to economic downturns.

[72] European Commission, 2021, Employment and Social Developments in Europe. 2021 Annual review, p. 26.

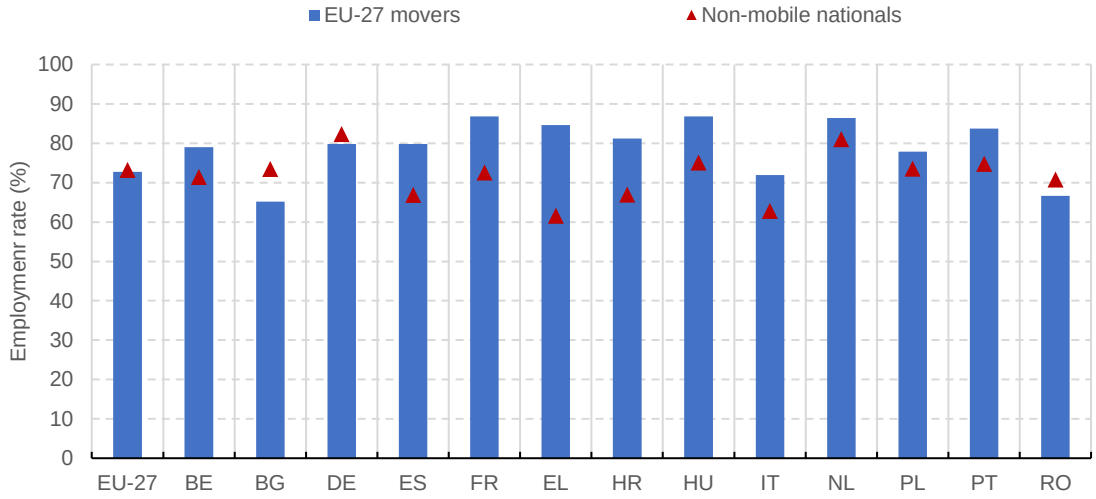
Figure 40: Unemployment rates of EU movers and nationals aged 20-64 in selected EU and EFTA countries, 2019-2020



Member States hosting the most active movers (>200 000)
Totals exclude movers born in their country of residence.
DE EU-LFS data had a break in series in 2020 and comparisons with 2019 have low reliability.

Source: Eurostat, EU-LFS 2020, specific extractions, Milieu calculations.

Figure 41: Employment rates of EU movers and non-mobile citizens in their country of origin, aged 20-64, 2020



Aggregate: EU-27
Totals exclude movers born in their country of residence.

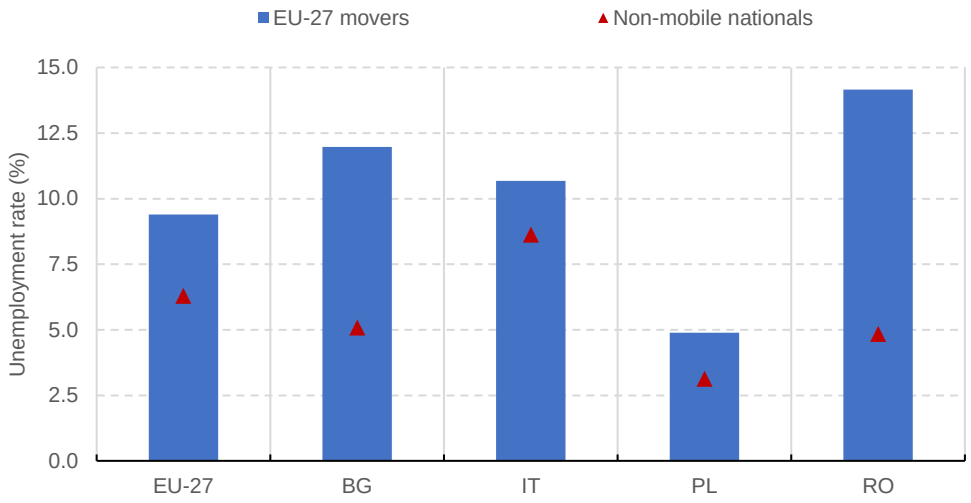
Source: Eurostat, EU-LFS, specific extractions, Milieu calculations.

For Romanian movers, while the employment rate had been similar to non-mobile workers between 2017 and 2019, in 2020 it was four percentage points lower. Among Bulgarian movers, the negative difference increased slightly in 2020. For Polish movers, employment rate remained higher than for non-mobile workers in 2020 but was lower than in the preceding three years; a similar development was evident among Italian movers. Figure 41

shows that for several nationalities the employment rate of movers was higher than for non-mobile workers of the same nationality.

Unemployment was also more likely among movers in these countries, as demonstrated by the difference in unemployment rates of Bulgarian, Italian, Romanian and Polish movers and the nationals in their countries of origin (see Figure 42).

Figure 42: Unemployment rates of EU movers and non-mobile citizens in their country of origin, aged 20-64, 2020



Totals exclude movers born in their country of residence.
Only countries are displayed where data were above reliability limits for all three categories of labour status.

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

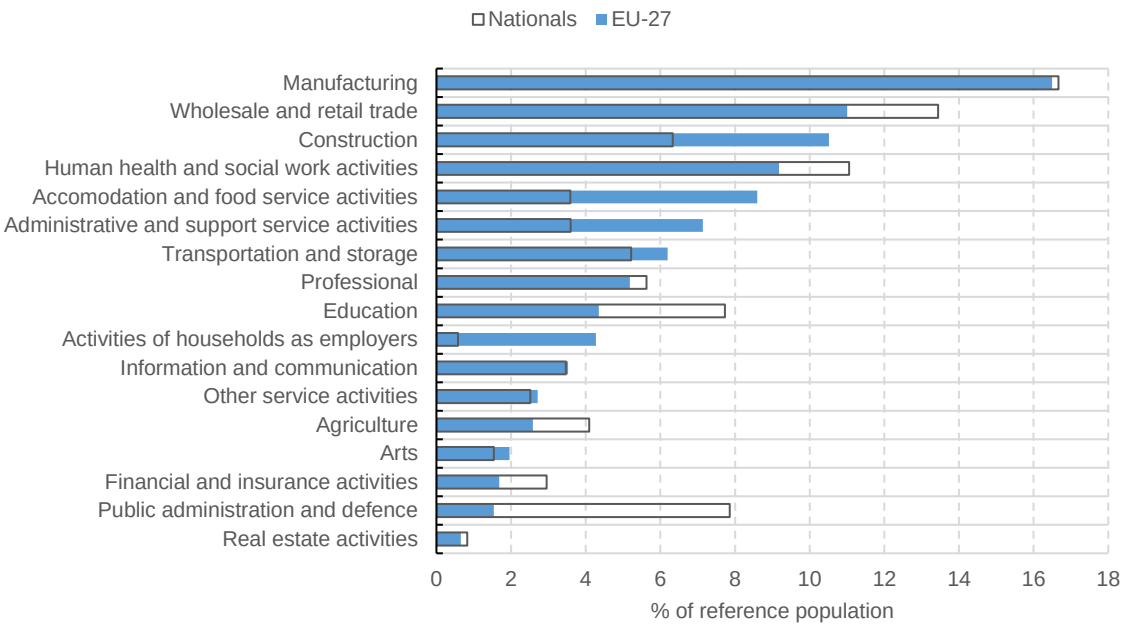
2.2.2. Sectors of activity and occupation

Overall, the distribution of EU-27 movers across different sectors in the EU-27 was very similar to that of previous years.

The main sectors of activity of EU-27 movers in 2020 were manufacturing, wholesale and retail trade, and construction, with 10 % or more EU-27 movers working in each of these sectors (Figure 43). Human health and social work, accommodation and food service, administrative and support service activities, and transport and storage were also important sectors, each employing 5-10 % of EU-27 movers.

Similar to previous years, EU-27 movers were more frequently than nationals employed in construction, accommodation and food service activities, administrative and support service activities, and activities of households as employers. They were less frequently employed in education and public administration than non-mobile workers.

Figure 43: 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[73].

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

Table 16: Numbers of EU movers aged 20-64 in sectors with largest changes between 2016 and 2020

	2016	2017	2018	2019	2020	Trend
Employed working-age EU-27 movers (thousands)						
Manufacturing	824	848	927	974	945	
Human health and social work	420	449	473	511	526	
Accomodation and food service	577	576	599	613	493	
Transportation and storage	296	339	371	418	355	
Professional	234	244	263	280	297	
Activities of households as employers	329	314	308	287	245	
Agriculture	194	185	175	186	148	
Changes compared to previous reference year (%)						
Manufacturing		3	9	5	-3	
Human health and social work		7	5	8	3	
Accomodation and food service		0	4	2	-20	
Transportation and storage		14	9	13	-15	
Professional		4	8	6	6	
Activities of households as employers		-5	-2	-7	-15	
Agriculture		-4	-6	6	-20	

EU aggregate: EU-27

[73] 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.

Results exclude movers born in their country of residence. Sectors are only shown when numbers are above reliability limits.

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

Figure 44 shows the shares of EU-27 movers and nationals, by occupational group. The occupations shown are the categories at the lowest level of detail available, to improve data reliability. Occupational groups may be matched against skill levels, which are indicated in brackets next to the group (1 being the lowest skill level and 4 the highest).

As in 2019, EU-27 movers were overrepresented compared to nationals in the lowest skill level group (elementary occupations). They worked slightly more often as craft and related trade workers and less frequently as clerks or as skilled farmworkers/fishermen, which correspond to a medium skill level. Altogether a similar share of movers worked in jobs requiring a medium skill level as nationals. Movers were underrepresented as technicians and associate professionals but almost as likely to hold a high-level occupation (professionals or legislators, senior officials or managers) as nationals.

Table 16 shows changes in the numbers of EU movers in the sectors with the largest changes since 2016. The largest positive changes were in the sectors of human health and social work and professional activities. The largest negative changes were in agriculture and activities of households as employers. In 2020, several sectors were particularly hard-hit, including accommodation and food services, agriculture, and activities of households as employers. The sector of professional activities increased in importance in 2020. The number of non-movers employed in professional activities in 2020 decreased marginally on 2019.

In almost all sectors with sizeable employment, the number of EU-27 movers increased between 2016 and 2019, with the strongest increase (+41 %) in the transport sector. The increase was also much stronger among EU-27 movers than among nationals. Exceptions to this were employment in households and agriculture, where employment among EU-27 movers decreased.

In 2020, several sectors suffered from the COVID-19 crisis and employment decreased, again more strongly among EU-27 movers than among nationals. The decrease was strongest in accommodation and food services, agriculture, construction, transport and households as employers (see Chapter 3).

Countries differed in respect of the sectors that were most important in the employment of EU-27 movers (Table 17). In Italy and Germany, manufacturing was by some way the most important sector, whereas in France it was construction, in Spain accommodation and food services, and in Switzerland human health and social work.

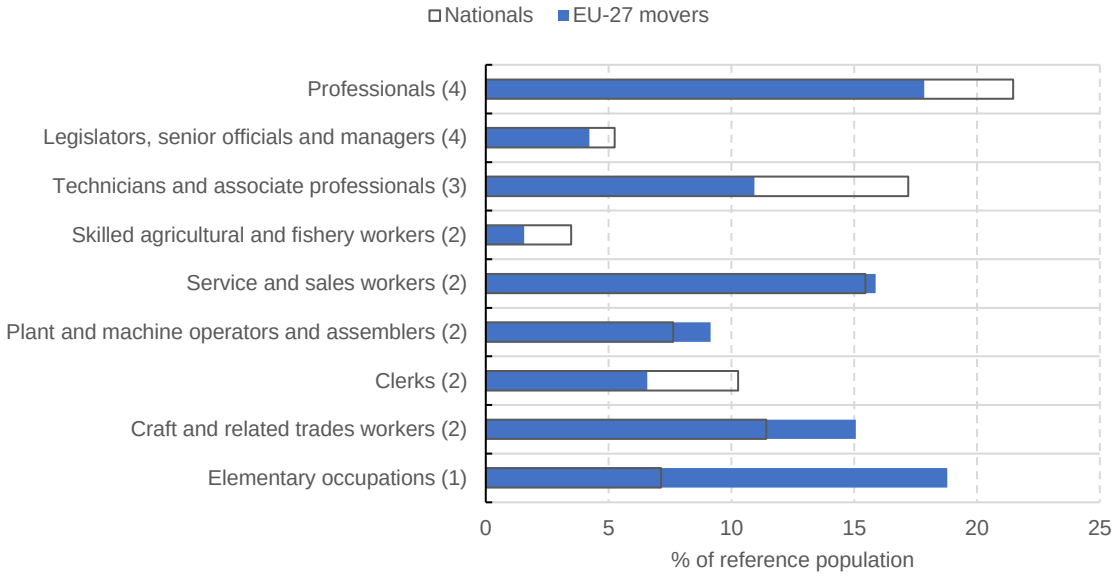
Table 17: Share of employment of EU movers in main countries of destination, most important sectors, 2020

	France		Germany		Italy		Spain		Switzerland	
	1000s	%	1000s	%	1000s	%	1000s	%	1000s	%
Accomodation and food service	36	11	159	12	50	11	113	22	50	11
Construction	102	32	166	12	96	22	81	16	67	15
Human health and social work	64	20	214	16	40	9	35	7	98	21
Information and communication	15	5	38	3	5	1	32	6	36	8
Manufacturing	41	13	423	31	140	32	98	19	102	22
Transportation and storage	10	3	146	11	57	13	55	11	32	7
Wholesale and retail trade	54	17	216	16	47	11	104	20	76	17
Total	321	0	1361	0	435		518		460	

EU aggregate: EU-27
Results exclude movers born in their country of residence.
Only sectors with 200 000 (4 % of total) or more employed EU-27 movers are shown. 100 % refers to all employed in the sectors shown.

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

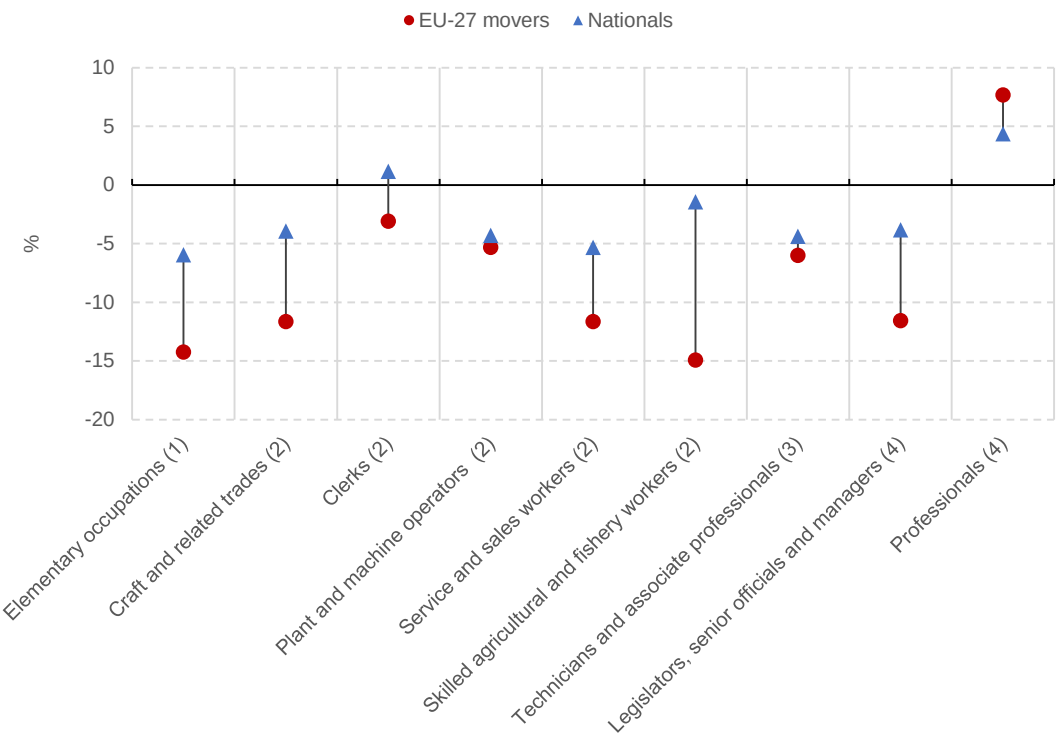
Figure 44: EU movers and nationals aged 20-64, by occupational group, 2020



EU aggregate: EU-27
Results exclude movers born in their country of residence.

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

Figure 45: Annual percentage change in total numbers of employed for EU movers and nationals aged 20-64, by occupational group, 2019-2020



EU aggregate: EU-27
The EU-27 aggregate includes results from Germany as a destination country.
Results exclude movers born in their country of residence.
Results exclude the category 'armed forces' as data were too low to be reliable for EU-27 movers.

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

In 2020, all occupational groups saw a drop in employment, except professionals, where employment grew (Figure 45). This may reflect that it was possible to perform these activities also under the restrictions imposed to fight the pandemic. It may also be indicative of wider structural changes to the labour market.

Excluding data from Germany, the changes between 2019 and 2020 in most occupations go in the same (negative) direction, but to a lesser degree.

2.2.3. Self-employment

Developments in 2020 led to a decrease in the numbers of self-employed EU-27 movers (Table 18). They made up around 11 % of all employed in 2019, falling to 7 % in 2020. However, the difference between self-employed EU-28 movers and EU-27 movers suggests that excluding the UK already influenced the share of self-employed. This seems logical, given that the UK had the third largest share of self-employed EU-28 movers (after Malta and Spain).

In most destination countries, less than 10 % of movers were self-employed; only a small proportion were self-employed with employees (Figure 46). Among nationals, these shares were somewhat larger, except for Belgium, Spain, France, Luxembourg and the Netherlands, where they are quite similar.

presents a brief overview of how total numbers changed over the past four years in these countries. In Spain and the Netherlands, in particular, 2020 represented a break in the pattern of strong increases in numbers of self-employed EU-27 movers. Belgium and France showed no such effect, however, likely due to the different sectoral concentrations of self-employed movers: in all four countries, construction was the main sector of self-employed movers, but in Spain, the numbers of self-employed in accommodation and food services and in wholesale and retail were almost as high. In the Netherlands, self-employed movers were spread across various sectors.

Table 18: Shares of self-employed among EU movers and nationals aged 20-64 years, 2016-2020

	2016	2017	2018	2019	2020	Treend
Working-age nationals (%)						
Employee	85	85	85	85	85	
Self-employed w. employees	4	4	4	4	4	
Self-employed, no employees	10	10	10	10	10	
Working-age EU-27 movers (%)						
Employee	89	89	89	89	93	
Self-employed w. employees	3	3	3	3	1	
Self-employed, no employees	8	8	8	8	6	
Working-age EU-27 movers (excl. Germany as destination) (%)						
Employee	88	88	88	87	90	
Self-employed w. employees	3	3	3	3	1	
Self-employed, no employees	9	9	9	9	9	

EU aggregate: EU-27. EU-26: EU-27 minus DE
Totals exclude movers born in their country of residence. only countries where reliable data were available for all employment categories are displayed.

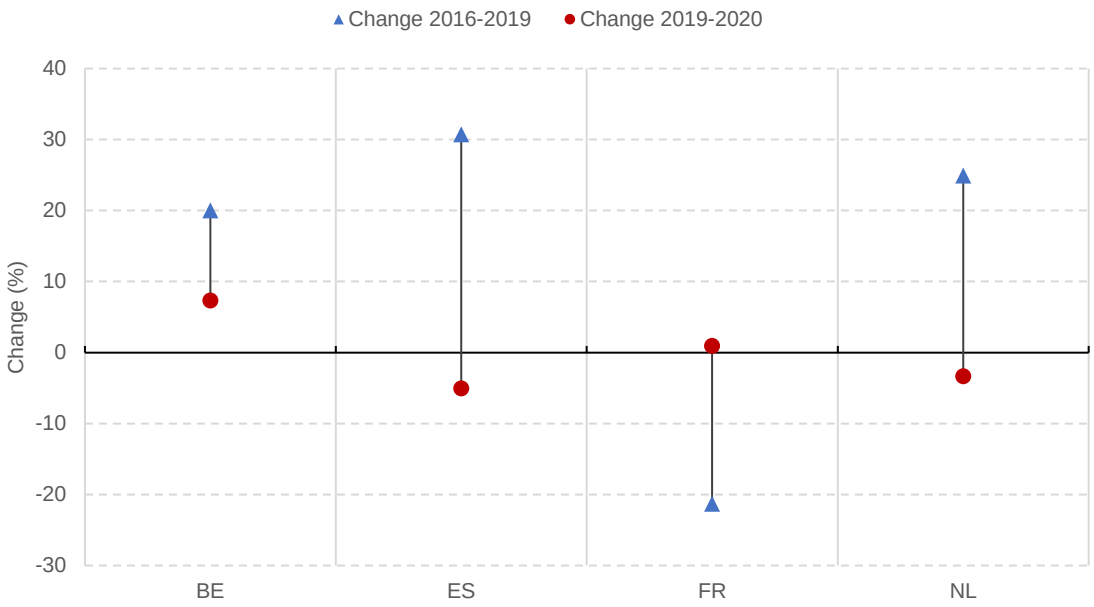
Source: Eurostat, EU-LFS, specific extractions, Milieu calculations.

Figure 46: Shares of self-employed among EU movers and nationals aged 20-64 years, by selected destination country, 2020

Totals exclude movers born in their country of residence. Only countries where reliable data were available for all employment categories are displayed.

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

Figure 47: Change in number of self-employed EU movers aged 20-64 in selected countries, 2016-2020



EU aggregate: EU-27
Countries with largest shares of self-employed EU-27 movers
Totals exclude movers born in their country of residence.
Source: Eurostat, EU-LFS, specific extractions, Milieu calculations.

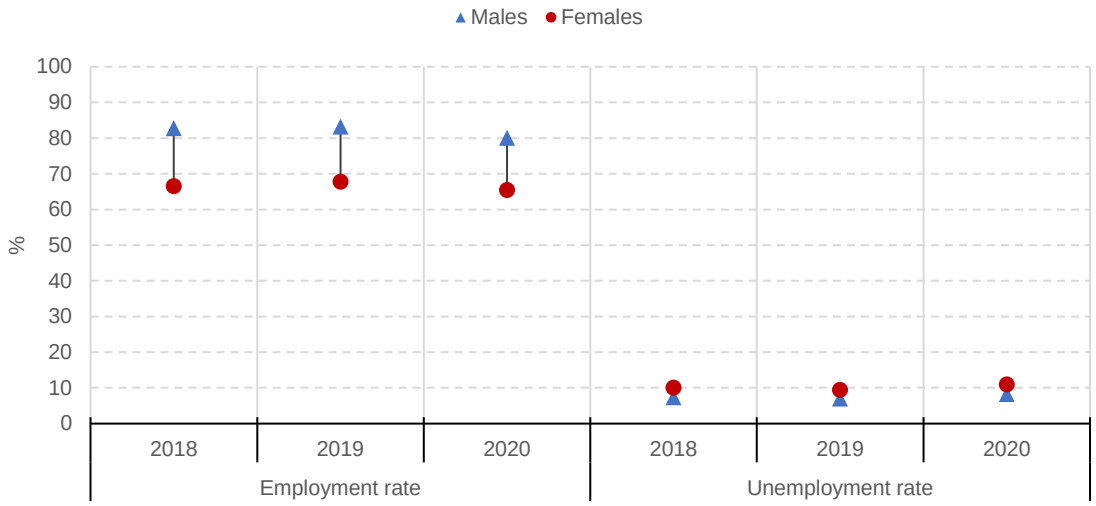
2.2.4. Gender dimension

The decrease in EU-27 movers' employment rate in 2020 appears to have affected both women and men to a similar extent (see Figure 48). The similar decrease in employment rate among both groups meant that the overall gap of 15 pps remained unchanged from 2019. Looking at the unemployment rate, the gender gap widened slightly (3 pps higher rate for female movers), with female movers' unemployment rate increasing slightly more than that of male movers.

In several key destination countries, the gender gap in employment rates was similar to the 15 pps average, namely in Belgium, Germany, Spain and Sweden (Figure 49). In Spain, the strong decline in employment in 2020 affected both gender groups equally, whereas in Germany, male movers were slightly more affected. In Italy and Ireland, the gender gap was larger (-23 pps and -20 pps, respectively, for female movers), with the decline in Italy slightly larger for women. By contrast, in Austria, France, Luxembourg, the Netherlands and Switzerland, the gender difference was lower than the EU average. In addition, for all countries where data were available for both years (Austria, France, Luxembourg, Switzerland), the change in 2020 affected both gender groups to roughly the same extent.

The unemployment situation was more equal between the genders than the EU aggregate suggests in Austria, Belgium, Germany, France, Ireland, Luxembourg and Switzerland, where the gap was 1 pps (Figure 50). In Germany, female movers had a lower unemployment rate than male movers. However, the gap was larger in Spain, Italy, the Netherlands and Sweden (between +4 pps and +6 pps for female movers). In Austria, Germany and Sweden, unemployment grew more strongly among male movers, while it grew more strongly among female movers in Spain and Luxembourg.

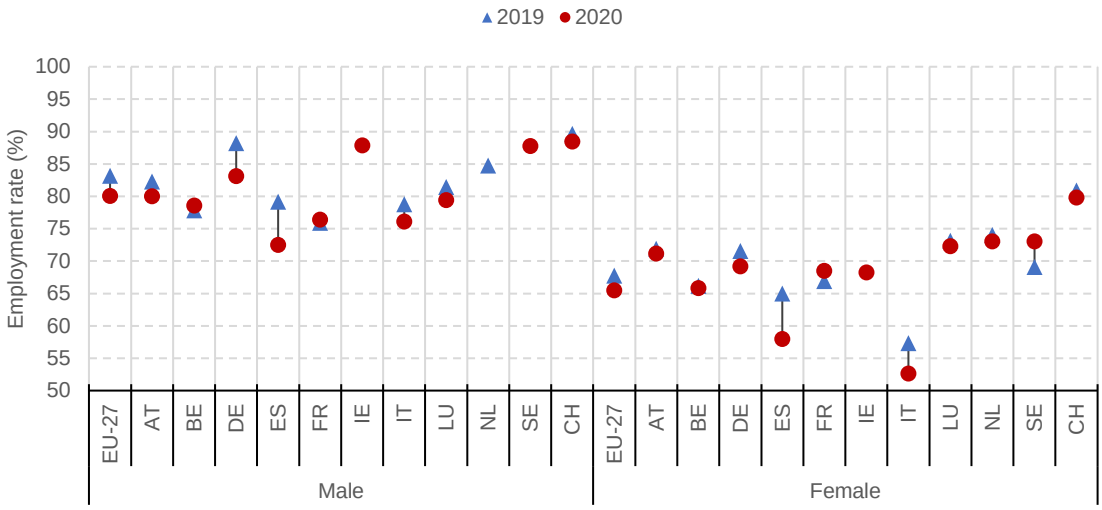
Figure 48: Employment rates and unemployment rates of male and female EU movers aged 20-64 years, 2018-2020



Aggregate: EU-27
Totals exclude movers born in their country of residence.

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

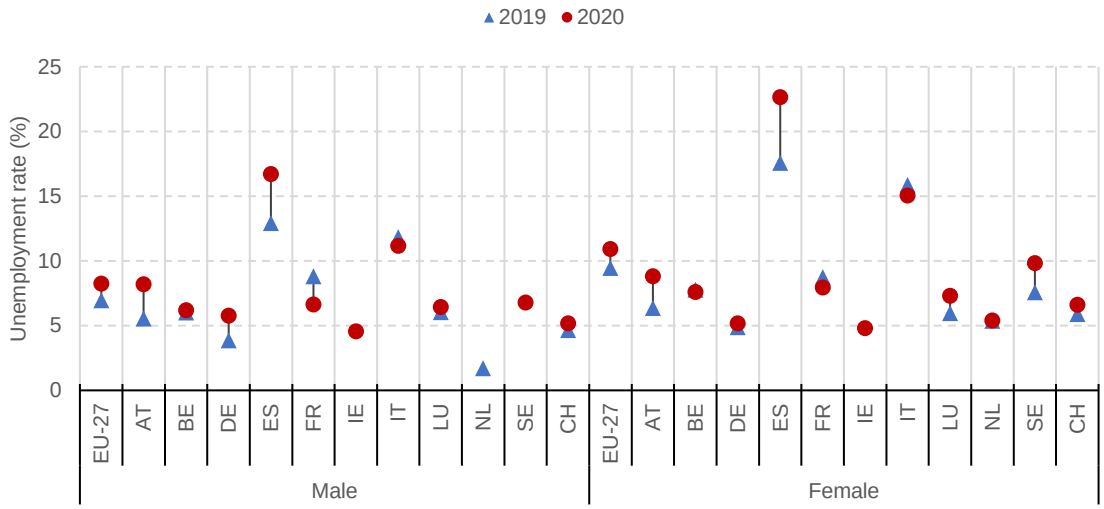
Figure 49: Employment rates of male and female EU movers aged 20-64, in selected destination countries 2019-2020



Totals exclude movers born in their country of residence.
Only countries and categories where reliable data were available are displayed.

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

Figure 50: Unemployment rates of male and female EU movers aged 20-64, in selected destination countries 2019-2020



Totals exclude movers born in their country of residence.
Only countries and categories where reliable data were available are displayed.

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

2.2.5. Education

At EU level, just over one-third of EU-27 movers had a high educational attainment level (ISCED 5-6)[74], 40 % had a medium educational attainment level[75] (ISCED 3-4) and 26 % had a low[76] educational attainment level (ISCED 0-2) as their highest educational achievement (see Figure 51). While the share of highly educated was similar to that of nationals, the share of movers with a low educational level was higher than nationals. The education level of movers varied substantially between Member States, affecting occupations.

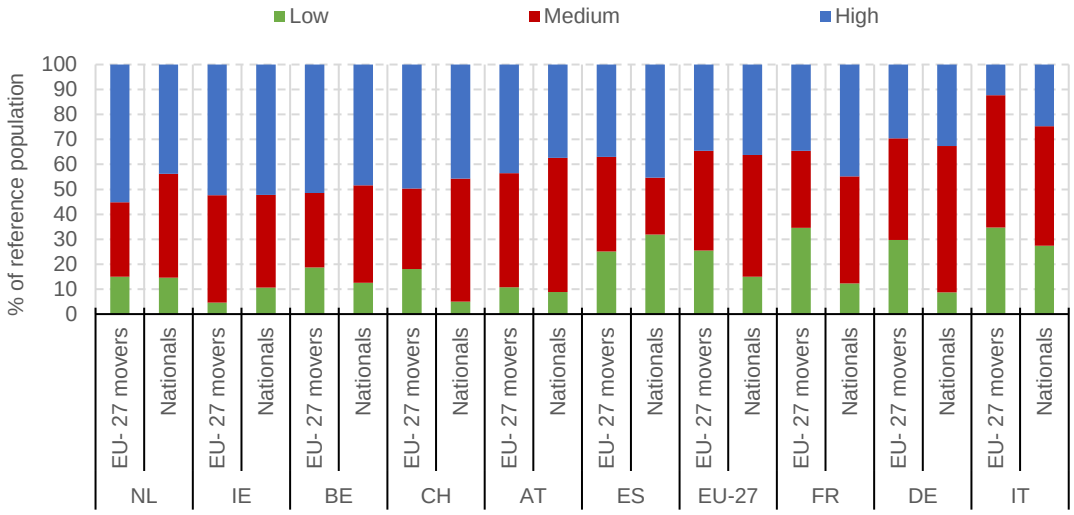
In several of the smaller main countries of destination (the Netherlands, Ireland, Belgium, Switzerland and Austria), the highly educated made up close to or more than half of all movers. In these countries, the group of movers with the lowest educational achievement was quite small. However, in the largest countries of destination (Spain, France, Germany, Italy), the shares of highly-educated movers were lower (below 40 %) and those of low educated movers were higher (above 20 %). The largest groups of movers with low education levels were in France and Italy (35 % each). In France 35 % of movers had a high education level but in Italy this group was small (12 %).

[74] The categories of education levels are based on the ISCED levels. 'High' refers to IESCED levels 5-8, including short-cycle tertiary, Bachelor or equivalent, Master or equivalent and Doctor or equivalent. Source: Eurostat, https://ec.europa.eu/EUROSTAT/statistics-explained/index.php?title=International_Standard_Classification_of_Education_(ISCED)#Implementation_of_ISCED_2011_.28levels_of_education.29 .

[75] Ibid., 'Medium' refers to IESCED levels 3 and 4, meaning upper secondary or post-secondary education.

[76] Ibid., 'Small' corresponds to IESCED levels 0 to 2, including early childhood education, primary or lower secondary education.

Figure 51: Education level of EU movers and non-mobile citizens aged 20-64 in selected destination countries, 2020



The categories of education levels are based on the ISCED levels. "High" refers to ISCED levels 5-8; "Medium" corresponds to ISCED levels 3-4 and "Low" corresponds to ISCED levels 0-2.
Totals exclude movers born in their country of residence.
Only countries and categories where reliable data were available are displayed.

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

The group of highly educated among EU-27 movers in the EU-27 Member States increased between 2016 and 2020 (see Table 19).

Table 19: Educational attainment levels of EU movers aged 20-64, 2016-2020

		2016	2017	2018	2019	2020
EU-27	Low (ISCED 0-2)	27 %	26 %	26 %	26 %	26 %
	Medium (ISCED 3-4)	43 %	43 %	42 %	42 %	40 %
	High (ISCED 5-6)	30 %	30 %	31 %	32 %	35 %

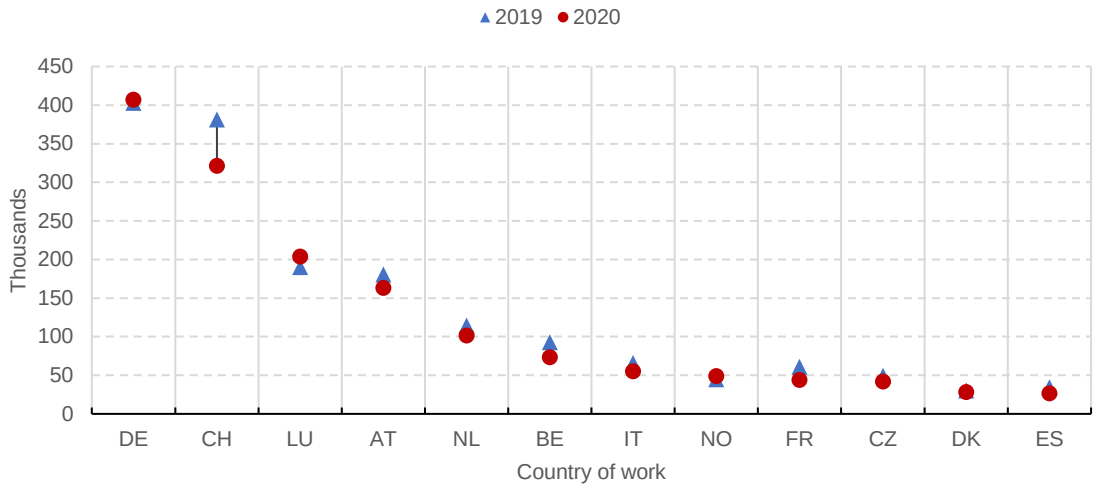
Aggregate: EU-27
Totals exclude movers born in their country of residence.
Distribution excluding DE is very similar to full EU-27 numbers, therefore not displayed separately.

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

2.2.6. Cross-border workers

In 2020, there were 1.3 million cross-border workers of working age in the EU-27 Member States, meaning EU-27 or EFTA citizens living in one EU country and working in another. This constitutes a decrease of 3 % on 2019. Furthermore, there were 371 000 EU-27/EFTA citizens living in an EU country and working in an EFTA country, 321 000 of whom were in Switzerland; and 6 000 living in an EFTA country and working in an EU country.

Figure 52: Incoming EU-27/EFTA cross-border workers aged 20-64, by country of work, 2019-2020

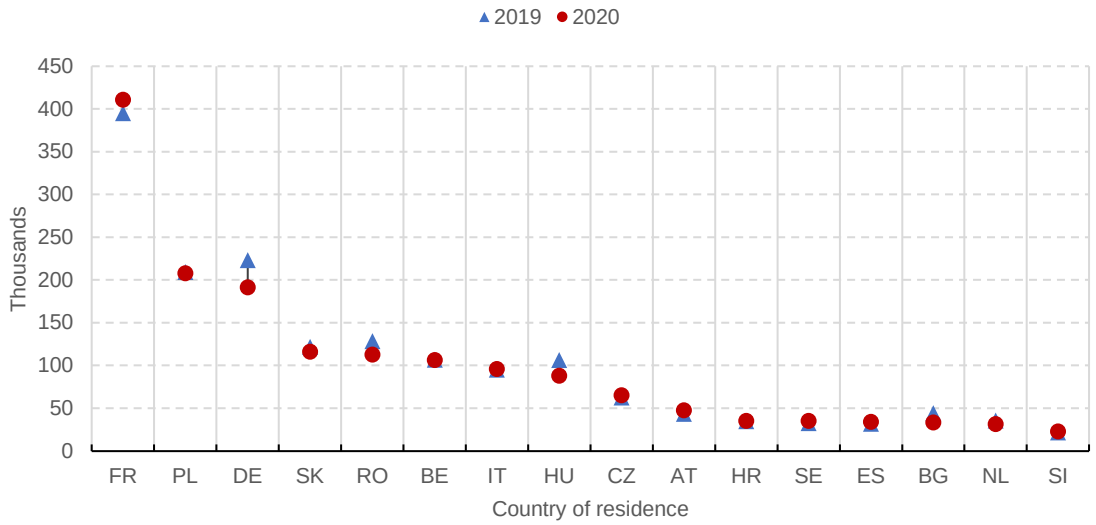


Numbers include EU-27 and EFTA citizens.

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

Figure 52 shows the number of EU-27/EFTA cross-border workers by their country of work. Germany and Switzerland are by far the most attractive destinations for cross-border workers. The largest number of cross-border workers in Germany come from Poland (around 100 000), followed by the Czech Republic, Romania and France (40 000 each). In Switzerland, the largest group by far are persons residing in France (200 000), followed by Italy (70 000) and Germany (40 000). The graph shows that in several countries of work, the numbers of cross-border workers have decreased between 2019 and 2020. This includes Switzerland with the largest decrease; but also Austria, the Netherlands and Belgium, which also receive quite large numbers of cross-border workers. The relative decreases were largest in France, Spain and Belgium which lost 20 – 30 % of their cross-border workers. In Germany and Luxembourg, on the other hand, numbers increased slightly.

Figure 53: Outgoing EU-27/EFTA cross-border workers aged 20-64, by country of residence, 2019-2020



Numbers include EU-27 and EFTA citizens. Graph excludes countries with less than 20 000 cross-border workers.

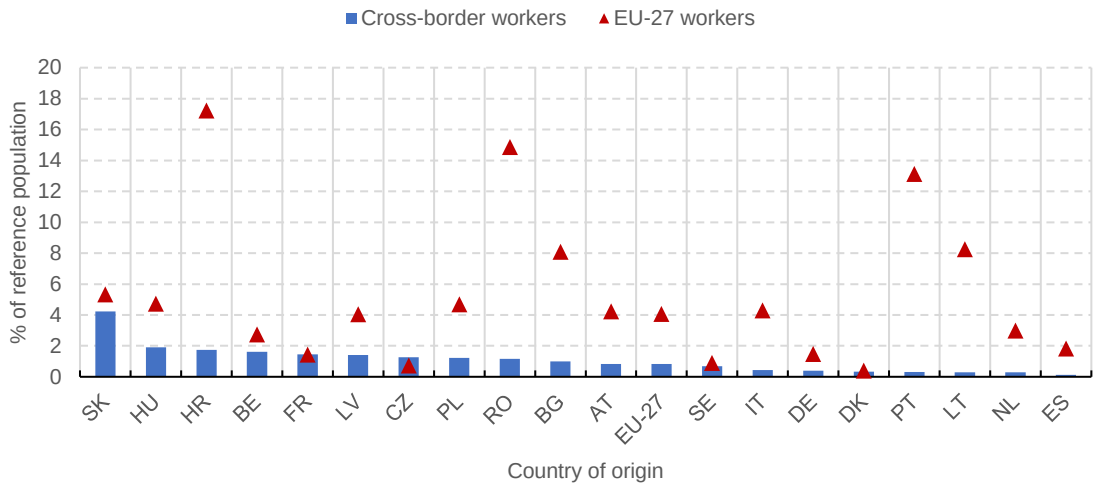
Source: Eurostat, EU-LFS, specific extractions, Milieu calculations.

As Figure 53 shows, most cross-border workers reside in France, perhaps unsurprising given its location next to three high-income countries, Germany, Luxembourg and Switzerland. Polish and German residents also work abroad in larger numbers. Of the Polish cross-border workers, around half work in Germany, and 10 – 20 % each in Norway, the Netherlands, the Czech Republic and Austria. The German cross-border workers mostly work in Luxembourg and Switzerland.

Figure 54 shows the numbers of cross-border workers and of EU-27 movers as shares from the total employed persons of the country of origin working in the EU. The latter includes cross-border workers who are nationals of and reside in the indicated countries, but work in another EU-27 or EFTA country; EU-27 movers who are nationals of the indicated countries; and finally, nationals of the indicated countries who live and work within the country.

Shares of cross-border workers vary less strongly between the Member States than those of EU-27 movers; furthermore, the shares of cross-border workers are mostly lower than those of movers. Exceptions are Slovakia, where they are almost equal and the Czech Republic where they are actually higher than that of movers. In Slovakia, this is due to the large number of cross-border workers, also in total numbers, when compared to other countries. Among other things, this is linked to the proximity to the Austrian border and, especially, Vienna which attracts many cross-border workers. Around one third of Slovakian cross-border workers work in Austria. Slightly less than one third work in each of Czechia and Germany. For cross-border workers from Czechia, Germany is the main country of work.

Figure 54: Cross-border workers and EU movers as a percentage of all employed nationals, by country of origin, 2020



Shares are calculated from nationals of a certain country who are either employed in their country of nationality or in another EU country (as cross-border workers or as movers).

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

3. COVID-19 and intra-EU labour mobility

Free movement of workers is one of the pillars of the internal market of the European Union. With the arrival of the pandemic, governments across the EU have looked to reduce movement of people in order to stem the spread of the virus. Restrictions on movement have particularly affected mobile workers. Highly mobile workers, such as seasonal workers or transport workers are regularly crossing borders for their work. Many of these highly mobile workers, but also many long-term movers, work in the provision of essential goods and essential services. Long-term movers have also been affected by social impacts of the pandemic, such as inability to visit friends and family in their EU country of origin for long periods, and future long-term movers have faced new obstacles to moving to another EU country for work.

This chapter studies the impact of the COVID-19 pandemic on intra-EU labour mobility to see how mobility of different groups has changed compared to previous years. This chapter is structured as follows. The first section provides a brief description of these factors and the context for the analysis. The second section examines the impact of the pandemic on long-term mobility. Sections 3 to 5 then focus on the analysis of different forms of mobility: cross-border workers, short-term movers and seasonal workers, and finally posted workers.

Key findings

Overall developments

- **The COVID-19 pandemic has reduced labour mobility in the European Union 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 timing of the pandemic's progression 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. This is also illustrated by the fact that 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.

Sectoral impacts

- **Employment of movers in sectors marked by 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. Separately, employment of movers increased in sectors which were less hard hit by the pandemic, being adaptable to telework as a main criterion (information and communication and professional

activities) and in the health sector, which saw increased workload during the pandemic.

- **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 retail trade). However, in the sectors were 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).

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 level of cross-border workers who on an EU-level was most noticed 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 be 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 in Central and Western Member States about a lack of labour supply for harvests, solutions were found by governments to ensure that seasonal workers were able to travel. This situation highlighted the dependence of some countries on seasonal workers from other Member States.

The unprecedented nature of the pandemic and the changes it forced upon people's daily lives also created economic and social situations that are likely to have influenced the decisions of long-term movers and potential movers. This includes factors such as job losses and job availability, geographical distance from family members and close ones, access to social security in the case of unemployment, ease of access to health services and simply uncertainty about the future. Travel bans may have influenced decision-making of movers and potential movers not wishing to be far from their families if they are unable to make return trips to visit them as they would normally[77].

Mobile workers occupy a significant portion of posts that have been defined as 'key workers' during the pandemic[78]. These include both skilled jobs (health professionals, teaching professionals, science and engineering associate professionals) and low-skilled jobs (personal care workers, cleaners and helpers)[79].

Highly mobile workers have been particularly affected by the pandemic by nature of their place of employment and/or residence not being in a single or the same Member State. Highly mobile workers include frontier workers, seasonal workers and posted workers, as well as international transport workers (this list is non-exhaustive)[80]. Aside from border closures, challenges potentially faced by highly mobile workers during the pandemic included loss of jobs or job prospects, potential ineligibility for social benefits or assistance, poor health and safety conditions in the workplace and reduced quality of living conditions[81].

The COVID-19 crisis has shined a light on the reliance of EU countries' agri-food systems on seasonal workers from other EU countries and third countries[82]. For instance, seasonal agricultural labour from Romania and Bulgaria continued to be called to work on farms in Western Europe during the initial months of the pandemic when movement was severely restricted. This raised concerns as to the safety of measures put in place (or not) for workers, manifested by photos and reports of crowded airport lounges and outbreaks of COVID-19 among poorly protected seasonal workers. Chartered flights were sometimes organised to bring in seasonal workers despite travel bans as farmers' unions across Europe warned of the risk of the harvest rotting.

3.1. Political responses to the COVID-19 pandemic with relevance for free movement

As part of their efforts to reduce the spread of the virus, in March 2020 Member States began to introduce border checks restricting entry into their territory, including within the Schengen Zone. On 17 March 2020, the European Council agreed to restrict non-essential travel between EU Member States for a period of 30 days[83]. The European Commission

77 Georgiev, O. (2020), 'The grand return: COVID-19 and reverse migration to Bulgaria', November 2020, European Council on Foreign Relations, https://ecfr.eu/wp-content/uploads/Remigration-Report-ECFR-EN.pdf.

78 Fasani and Mazza (2020), 'Immigrant Key Workers: Their Contribution to Europe's COVID-19 Response', https://knowledge4policy.ec.europa.eu/publication/immigrant-key-workers-their-contribution-europes-covid-19-response_en.

79 Ibid.

80 ETUI contributors (2020), 'Essential but unprotected: highly mobile workers in the EU during the COVID-19 pandemic', ETUI, The European Trade Union Institute, 05 November 2020, available at https://www.etui.org/publications/essential-unprotected-highly-mobile-workers-eu-during-covid-19-pandemic (accessed June 18, 2021).

81 ETUI contributors (2020), 'Essential but unprotected: highly mobile workers in the EU during the COVID-19 pandemic', ETUI, The European Trade Union Institute, 05 November 2020, available at https://www.etui.org/publications/essential-unprotected-highly-mobile-workers-eu-during-covid-19-pandemic (accessed June 18, 2021).

82 Open Society European Policy Institute (2020), 'COVID-19, Agri-Food Systems, and Migrant Labour', July 2020, https://www.opensocietyfoundations.org/publications/are-agri-food-workers-only-exploited-in-southern-europe.

83 European Council (2020), Conclusions by the President of the European Council following the video conference with members of the European Council on COVID-19, 17 March 2020, https://www.consilium.europa.eu/en/press/press-releases/2020/03/17/conclusions-by-the-president-of-the-european-council-following-the-video-conference-with-members-of-the-european-council-on-covid-19/.

worked alongside this towards keeping channels open for flows of workers, especially those participating in the provision of essential goods and services.

As Member States began to impose restrictions on travel, guidelines were issued to Member States in mid-March on allowing essential workers to continue to circulate, with a view to ensuring the continuing movement of goods and services[84]. Highly mobile workers such as transport or frontier workers are mentioned in these guidelines. The guidelines state that transport workers should be allowed to continue to circulate in order to promote the continued free circulation of essential goods and guarantee the supply chains of essential goods. They also state that Member States should facilitate the crossing of borders by frontier workers, especially those working in health and food sectors and other essential services. This was complimented with a communication encouraging the opening of 'Green Lanes' that would enable essential services and transport workers to continue to cross borders with minimum disruption as Member States severely restricted the movement of most of the population[85].

A second set of guidelines were issued at the end of March 2020 specifically on the exercise of free movement of workers during the pandemic[86]. This Communication of the Commission underlines the importance of frontier workers, posted workers and seasonal workers to the provision of healthcare and medical equipment infrastructure. The guidelines provide a non-exhaustive list of essential occupations that covers workers in the healthcare, personal care and emergency services, the pharmaceutical industry, essential infrastructure, food production and transport. The guidelines also encourage Member States to ensure that social security coverage is maintained for frontier and posted workers. They provide a basis for seasonal agricultural workers to be covered by the same permission to cross borders as workers in crucial sectors and be provided with adequate health and safety protection from employers.

During the period of April and May 2020, certain EU countries opened 'travel corridors' for seasonal workers in essential sectors, primarily agriculture, responding to fears from farmers' associations that there would be insufficient labour available to complete the harvest[87]. This is described in detail in Section 3.4.

Specific guidance on free movement of health professionals was issued in a Commission Communication in early May 2020[88]. This Communication advises Member States of provisions under the Professional Qualifications Directive[89] that enable them to accelerate recognition of qualifications of health professionals in order to facilitate mobility for health professionals.

From June 2020, EU Member States began to soften restrictions on freedom of movement. In its roadmap for reopening borders, the European Commission stated that priority should be given to seasonal and cross-border workers, with an emphasis on avoiding

[84] European Commission (2020), "COVID-19. Guidelines for border management measures to protect health and ensure the availability of goods and essential services", C(2020) 1753 final, Brussels, 16.3.2020, para. 21. https://ec.europa.eu/home-affairs/sites/default/files/what-we-do/policies/european-agenda-migration/20200316_covid-19-guidelines-for-border-management.pdf.

[85] Communication from the Commission on the implementation of the Green Lanes under the Guidelines for border management measures to protect health and ensure the availability of goods and essential services, C(2020) 1897 final, https://ec.europa.eu/transport/sites/default/files/legislation/2020-03-23-communication-green-lanes_en.pdf.

[86] European Commission (2020), Communication from the Commission: Guidelines concerning the exercise of the free movement of workers during COVID-19 (2020/C 102 I/03), https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52020XC0330(03).

[87] See the section on the impact of the pandemic on short-term movers for a detailed discussion of these measures.

[88] Communication from the Commission on Guidance on free movement of health professionals and minimum harmonisation of training in relation to COVID-19 emergency measures – recommendations regarding Directive 2005/36/EC, C(2020) 3072 final, https://ec.europa.eu/info/sites/default/files/guidance-movement-health-professionals-harmonisation-training-covid19_en.pdf.

[89] Directive 2005/36/EC of the European Parliament and of the Council of 7 September 2005 on the recognition of professional qualifications.

discrimination against EU mobile workers[90]. This was reinforced in a further Communication proposing that free movement of workers should be one of three criteria considered by Member States when lifting restrictions and reiterating the importance of allowing frontier, seasonal, posted and transport workers to cross borders[91]. Also acknowledged was the importance of finalising the ongoing revision of social security coordination rules to provide better protection to mobile workers.

The European Union reacted to the situation of seasonal workers in summer 2020 firstly with a European Parliament Resolution on protection of cross-border and seasonal workers in the context of the COVID-19 crisis[92], and secondly with guidelines published by the European Commission on seasonal workers in the EU in the context of the COVID-19 outbreak[93].

As the pandemic progressed into the autumn following the arrival of a second wave, guidance was issued in a Council Recommendation to Member States on not imposing quarantine requirements on frontier, seasonal, transport and posted workers providing essential goods and services[94]. This also contained a clarification on common procedures for testing obligations for transport workers to minimise disruptions.

3.2. The impact of the pandemic on long-term mobility

2020 saw the first annual decrease in the number of employed movers in over nine years (Table 20). The number of employed EU movers in other EU Member States decreased in 2020 by 2.9 % compared to 2019. By comparison, the number of employed nationals decreased by 1.1 %[95]. The **unemployment rate** of EU-27 movers increased from 8 % in 2019 to 9 % in 2020, whereas the unemployment rate of nationals remained at 6 %.

At national level, there were different degrees of change in the numbers of employed EU-27 movers. Of the seven Member States hosting the most EU-27 movers, five reported a decrease in the number of employed EU-27 movers and two reported an increase. Substantial decreases in the number of employed EU-27 movers were seen in Spain (-8 %), Italy (-7 %) and France (-7 %). In Spain this ended a recent trend of annual increases of at least 5 % since 2016.

[90] European Commission and Council (2020), Joint European Roadmap towards lifting COVID-19 containment measures", Brussels, 15.04.2020 https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52020XC0417(06).

[91] Communication from the Commission, COVID-19 Towards a phased and coordinated approach for restoring freedom of movement and lifting internal border controls C(2020) 3250 final, https://ec.europa.eu/info/sites/default/files/communication_freemovement.pdf.

[92] European Parliament Resolution of 19 June 2020 on European protection of cross-border and seasonal workers in the context of the COVID-19 crisis (2020/2664(RSP)).

[93] European Commission (2020) Communication from the Commission on Guidelines on seasonal workers in the EU in the context of the COVID-19 outbreak, C(2020) 4813 final.

[94] Council Recommendation (EU) 2020/1475 of 13 October 2020 on a coordinated approach to the restriction of free movement in response to the COVID-19 pandemic https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02020H1475-20210202.

[95] Not including Germany, the number of employed nationals decreased by 1.2 %.

Table 20: Number of employed EU movers aged 20-64 in selected countries, 2011-2020

	2011	2016	2017	2018	2019	2020	Trend
Total employed working-age EU-27 movers (thousands)							
AT	207	326	351	369	392	409	
BE	238	294	316	329	337	340	
DE	1102	1921	1972	2146	2228	1956	
ES	660	699	732	778	854	786	
FR	557	536	551	582	581	540	
IT	642	769	765	771	785	730	
NL	113	157	175	182	202	198	
EU27	4110	5406	5613	5948	6201	5815	
EU-27-DE	3	3	4	4	4	4	
Change in number of employed movers compared to previous year in table (%)							
AT		6	8	5	6	4	
BE		4	8	4	3	1	
DE		17	3	9	4	-12	
ES		6	5	6	10	-8	
FR		10	3	5	-0.1	-7	
IT		2	-0.4	1	2	-7	
NL		7	11	4	2	-2	
EU27		9	4	6	4	-6	
EU-27-DE		5	4	4	5	-3	

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

In Austria and Belgium the number of employed EU-27 movers increased in 2020 compared to 2019 by 4 % and 1 % respectively. In both cases this was a slowing of the trend shown in previous years.

The unemployment rate for EU-27 movers at national level increased in Austria (+2 pps), Germany (+2 pps) and Spain (+5 pps); it decreased by one percentage point in France and Italy and stayed the same in Belgium and Netherlands. A similar pattern was seen for nationals in these Member States.

3.2.1. Evolution of mobility by quarter in 2020

Given the rapidly evolving nature of the pandemic in 2020, analysing employment data by quarter can help to better understand the effect the pandemic had on movers. In order to allow for seasonal variations in employment, a comparison was made between equivalent quarters in consecutive years. The analysis was carried out for the six Member States with the most EU movers.

The year-on-year quarterly analysis shows that the number of employed movers generally increases between each quarter of 2018 and the equivalent quarter in 2019, before a sharp drop in the number of employed movers in quarter two of 2020. This coincides with the first full months of the widespread restrictive measures in Europe to combat the virus that began in mid-March 2020. Measures included closing of hotels, restaurants and bars, restrictions on travel, closing of most shops other than supermarkets and pharmacies, and restrictions on non-essential production in some Member States. In most Member States restrictions began to be lifted in May and were significantly reduced during the summer (Q3), but then reintroduced again in the autumn, with strict measures by November (Q4).

Table 21 shows the year-on-year change in numbers of employed movers by quarter for selected EU Member States[96]. Year-on-year changes per quarter between 2018 and 2019 are positive in most of the selected countries, with particularly strong increases in Spain and the Netherlands of over 10 % in some quarters. However, whilst all Member States except Italy show a positive increase in the number of employed movers in quarter two between 2018 and 2019, in the same quarter between 2019 and 2020 there is a drop in all Member States of between 4 % (NL) and 14 % (FR), except in Austria. This drop endures in Italy throughout the rest of the year; in France, Netherlands and Belgium there is a recovery in the final two quarters, whilst in Spain the number of movers appears to have the most clear correlation with the progression of the virus. In Austria, the number of employed movers increases compared to 2019 by 2 % in quarter two, 7 % in quarter three and 2 % in quarter four.

Table 21: Year-on-year percentage change in number of employed EU movers aged 20-64, per quarter, in selected countries 2018-2020

	2019				2020				
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Trend
Employed working-age EU-27 movers (thousands)									
AT	379	386	396	405	403	395	424	412	
BE	329	337	319	357	361	317	321	348	
ES	842	863	844	869	836	754	779	775	
FR	575	599	560	553	545	517	539	531	
IT	749	773	816	793	740	714	737	720	
NL	200	204	207	197	195	196	203	196	
Year-on-on year change in employed movers (%)									
AT	5	4	6	9	6	2	7	2	
BE	7	6	-6	1	10	-6	1	-3	
ES	13	12	9	5	-1	-13	-8	-11	
FR	1	3	-1	-1	-5	-14	-4	-4	
IT	-1	-1	5	4	-1	-8	-10	-9	
NL	10	13	14	7	-3	-4	-2	0	

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

The annual changes in quarterly employment figures for nationals sketch a similar pattern but with softer year-on-year changes (remaining within the +/- 1 to 5 % range, rather than the +/- 1 to 15 % range seen for movers)[97]. Employment increased in all quarters in 2019 relative to the same quarter in 2018 in all Member States (besides a small drop in France in the 3rd quarter), before changing significantly in 2020 with falls in employment in all Member States except the Netherlands from Q2 onward.

Job retention schemes were put in place by Member States across the EU. These were generally based on a short-time work scheme, where firms may 'temporarily reduce the hours worked by their employees, who were provided with public income support for the hours not worked'[98]. These were backed up by the SURE instrument, which provided additional financial support through loans to help Member States protect employment[99]. In all the Member States studied in this chapter, schemes were extended until at least the

[96] These Member States were selected because they host the highest numbers of long-term movers. Although it hosts the most EU movers, Germany was not included because quarterly data for 2020 was not available at the time of writing.

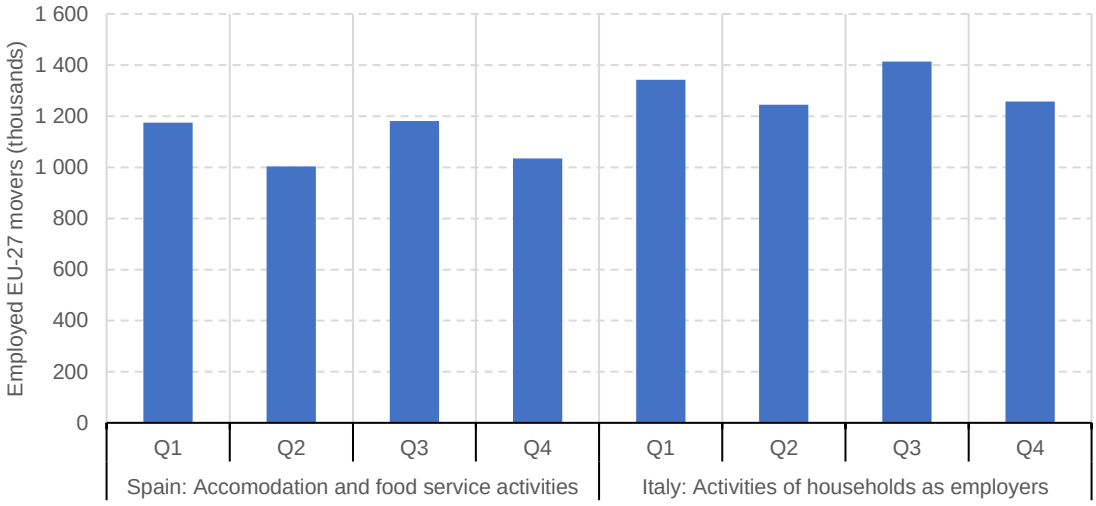
[97] See Annex for a visual representation of this data.

[98] Council Regulation (EU) 2020/672 of 19 May 2020 on the establishment of a European instrument for temporary support to mitigate unemployment risks in an emergency (SURE) following the COVID-19 outbreak

[99] For more information on SURE, see https://ec.europa.eu/info/business-economy-euro/economic-and-fiscal-policy-coordination/financial-assistance-eu/funding-mechanisms-and-facilities/sure_en

beginning of 2021[100]. In Q2 the proportion of employees participating or who had applied to participate in short-time work schemes reached 48 % in France, 47 % in Italy, 32 % in Austria and Belgium, 27 % in Germany and 23 % in the Netherlands[101].

Figure 55: EU movers aged 20-64 in Spain employed in accommodation and food service activities and in Italy employed in activities of households as employers, 2020



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

This pattern of a large drop in the second quarter, some degree of recovery in the third quarter and then another fall in the fourth quarter is further demonstrated in specific sectors. A comparison of the most important sectors for movers in both Spain (accommodation and food services) and Italy (activities of households as employers) show this pattern. Figure 55 shows that in both cases, the pattern over the four quarters of 2020 is of a decrease in Q2 followed by recovery in Q3 and another decrease in Q4[102].

The sector of activities of households as employers in Italy is particularly important in the context of the pandemic given that it covers long-term care, an occupation with many movers in Italy, particularly of Romanian origin. Available information suggests that long-term carers were strongly affected by the pandemic due to their proximity with older people, and older people's vulnerability to the virus. Reports from Italy tell of cases where movers were working as live-in carers and the person being cared for died; this had the capacity to create situations where the worker lost both their employment and their main residence with very little notice in a period where general restrictions on the population made it difficult to find alternative work and accommodation[103]. For live-in carers, strict restrictions in Italy on leaving one's residence also meant that on non-working days they were essentially unable to leave their workplace.

[100] ETUC (2020), Short Time Work Measures Across Europe, ETUC briefing note, 27 November 2020, https://www.etuc.org/sites/default/files/publication/file/2020-11/Covid_19%20Briefing%20Short%20Time%20Work%20Measures%2027%20November.pdf

[101] Müller and Schulten (2020), Ensuring fair short-time work – a European overview, ETUI policy brief, No. 7 / 2020, https://www.etui.org/sites/default/files/2020-06/Covid-19%2BShort-time%2Bwork%2BM%C3%BCller%2BSchulten%2BPolicy%2BBrief%2B2020.07%281%29.pdf

[102] At the time of writing data is unavailable for Q1 of 2021 in order to see if this trend continues.

[103] Stoica, D. (2020), „Badantele" românce din Italia față în față cu pandemia de coronavirus și abandonate de autorități', 26 March 2020, Rotalianul, https://www.rotalianul.com/badantele-romance-din-italia-fata-in-fata-cu-pandemia-de-coronavirus-si-abandonate-de-autoritati/.

3.2.2. Analysis by sector

The restrictions imposed by EU Member States to respond to the pandemic have affected the different sectors unequally. Some of the sectors where EU-27 movers are most prevalent, such as *accommodation and food services*, *transportation* and *human health and social work activities*, are amongst the sectors that have been most exposed to changes[104]. The changes in the stocks of EU movers[105] in these sectors between 2019 and 2020 reflect this. Other sectors that are more easily adaptable to teleworking may have been affected less severely.

Table 22 shows the evolution in the number of movers working in the eight most common sectors of employment among EU-27 movers. The figure shows the number of movers increased between 2016 and 2019 in all but *activities of households as employers*.

Table 22: Changes in stocks of EU movers aged 20-64, by sector, 2016-2020[106]

	2016	2017	2018	2019	2020	Trend
Employed working-age EU-27 movers (thousands)						
Manufacturing	426	460	499	532	522	
Wholesale and retail trade; repair of motor vehicles	383	390	390	410	415	
Construction	406	421	456	454	437	
Accomodation and food service activities	341	356	368	383	334	
Human health and social work activities	250	273	270	288	312	
Activities of households as employers	298	284	277	258	245	
Professional, scientific and technical activities	167	171	178	199	210	
Transportation and storage	165	188	203	230	209	
Year on year change (%)						
Manufacturing		8	8	7	-2	
Wholesale and retail trade; repair of motor vehicles		2	0	5	1	
Construction		4	8	0	-4	
Accomodation and food service activities		4	3	4	-13	
Human health and social work activities		9	-1	7	9	
Activities of households as employers		-5	-2	-7	-5	
Professional, scientific and technical activities		2	4	12	5	
Transportation and storage		14	8	13	-9	

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

In 2020 the number of employed movers decreased in all but three of these sectors. There is a negative inflection from the previous trend in the transportation, accommodation and food services and manufacturing sectors, showing a drop in the number of movers employed in these sectors. In *construction* and *activities of households as employers* a previous negative trend is continued in 2020. The number of movers increases in 2020 in

[104] This analysis uses the NACE 1D classification of sectoral activity. This is the least detailed level of the NACE sectoral classification system; it contains 23 sectors. The sectors presented selected for this analysis are the sectors with the highest prevalence of movers. It should be noted that these sectoral classifications are not detailed enough to give a detailed examination of the impact of the pandemic. For example, the category of human health and social work will include a large variety of sub-sectors, which may have been affected by the pandemic quite differently.

[105] Note that methodological changes in the German EU-LFS limits the comparability of 2020 data to previous years. However, due to its crucial role as a destination country of EU-27 movers, it is included in the EU-27 aggregates for annual data. No quarterly data for Germany for 2020 is available, so it is excluded from the EU-27 aggregates. Separate analysis excluding Germany from the aggregate has been carried out and strong deviations from the general trend are reported.

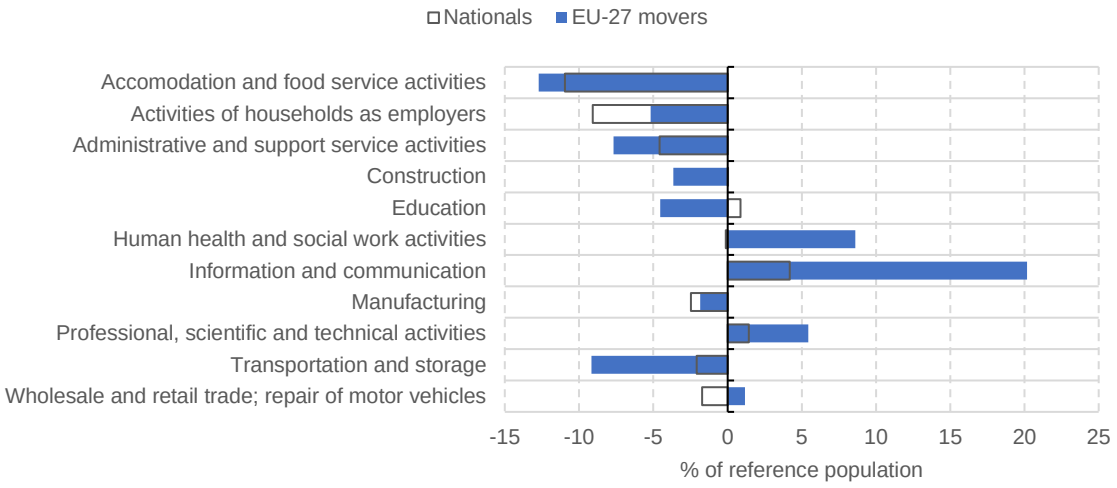
[106] This EU aggregate excludes data for movers in Germany, due to the methodological changes in the collection of data in Germany in 2020 that make comparisons between 2020 data and previous years unreliable. Inclusion of German data accentuates downward trends in 2020 for most sectors (for example, wholesale and retail trade and the professional sector decrease in 2020).

the sectors of *wholesale and retail trade*, *professional, scientific and technical activities* and *human health and social work activities*. Including data from Germany, for which 2020 data is not directly comparable with previous years, changes for 2020 are depressed compared to when Germany is not included: decreases compared to 2019 are recorded for all sectors except professional activities. This is a reflection of the important weight of Germany as a destination country for movers (Germany hosted one third of EU-27 movers in 2019).

The changes in employment of movers in sectors such as accommodation and food services or transportation correspond with the known impacts of the pandemic on these parts of the economy, with hotels and catering closed and travelling severely restricted. This mirrors changes in the employment of non-movers in these sectors, which also decreased. However, there are differences between changes in the employment of movers and changes in the employment of nationals in some sectors, principally in terms of magnitude of job losses.

In 2020, the number of movers employed decreased more than the number of nationals employed in accommodation and food services, transportation and storage and construction (Figure 56). However, in other sectors data from the EU-LFS shows an increase in the number of movers and to a greater extent than for nationals. This was the case for professional activities, human health and social work, wholesale and retail trade, and most markedly in information and communication. Professional, scientific and technical activities and information and communication are two of the most adaptable sectors to teleworking[107], and health work covers medical occupations considered essential during the pandemic. 79 % of jobs in information and communication and around two thirds of jobs in professional, scientific and technical activities are considered teleworkable.

Figure 56: Annual percentage change in EU movers and nationals aged 20-64 employed by sector, 2019-2020[108]



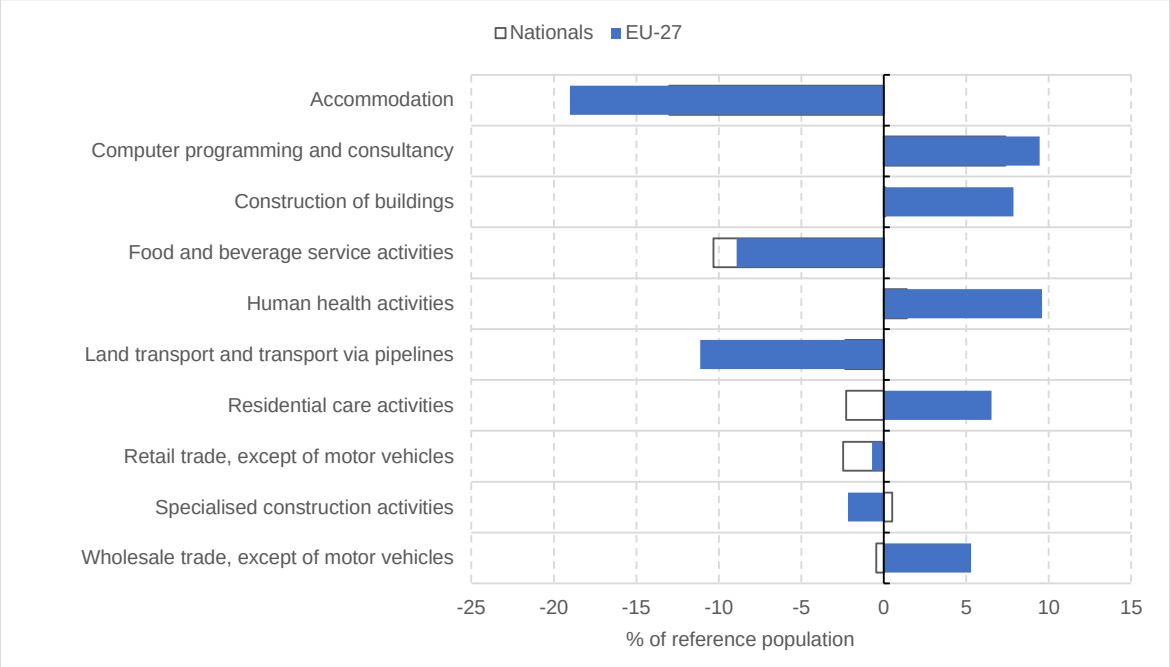
EU aggregate: EU-27
Germany excluded as destination country.
Source: Eurostat, EU-LFS, specific extractions, Milieu calculations.

[107] For an analysis of 'teleworkability' sector-by-sector, see p. 47 of Sostero et al. (2020), 'Teleworkability and the COVID-19 crisis: a new digital divide?', JRC working paper, https://ec.europa.eu/jrc/en/publication/eur-scientific-and-technical-research-reports/teleworkability-and-covid-19-crisis-new-digital-divide.

[108] 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.

Changes in employment between 2019 and 2020 for more detailed subsectors[109] related to hospitality or transport further underline the strong impact that the pandemic has had on those sectors directly hit by the pandemic restrictions[110]. Accommodation, land transport and food and beverage service activities also all see decreases in employment of nationals. Figure 57 shows the year-on-year percentage change in EU-27 movers and nationals employed in 10 detailed sectors with significant numbers of EU movers in 2019. There are increases in the number of movers employed in computer programming, human health activities, residential care activities, wholesale trade as well as construction of buildings (but not specialised construction activities, which includes activities such as demolition and installation of electricity and plumbing). Other than for construction, these echo the annual changes seen in the broad sectors and underlines the importance of employment in the health sector in 2020. In all of those sectors, employment of movers fares better than employment of nationals.

Figure 57: Annual percentage change in EU-27 movers and nationals employed by detailed sector, 2019-2020[111]



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

Country-by-country sectoral differences

There were significant variations between Member States in how employment of movers developed in 2020 in certain sectors. Industrial production was affected by the crisis: rates of production dropped 27.5 % between February 2020 and April 2020 as restrictions were put in place by EU Member States, including the stopping of non-essential production in Italy and Spain[112]. In some major destination Member States such as Austria and Belgium the recovery has been strong, almost reaching pre-crisis levels by December 2020. On the

[109] This detailed sectoral data uses the NACE 2D classification of sectors of activity, which contains 89 sectors, compared to the 22 sectors available under the NACE 1D (less detailed) classification of sectors.
[110] See below for further discussion of the effect of the pandemic on specific sectors.
[111] The detailed sectors selected are the 12 sectors where the most EU-27 movers were concentrated in 2019. Data for detailed sector includes EU-27 movers born in their country of residence.
[112] Eurostat (2021), 'Impact of COVID-19 crisis on industrial production', Eurostat statistics explained, https://ec.europa.eu/EUROSTAT/statistics-explained/index.php?title=Impact_of_Covid-19_crisis_on_industrial_production.

other hand, Germany was still considerably below pre-crisis levels[113]. There appears to be some correlation here with changes in EU-27 mover employment in the manufacturing sector.

Another major sector for movers is wholesale and retail trade. Numbers of EU-27 movers increased in this sector in Spain by 7 %. Employment of nationals in the sector in Spain decreased. In other major destination countries, employment of movers in the sector fell, by 4 % in Belgium and by 3 % in the Netherlands where it is one of the most important sectors for movers. Data on retail trade volume suggests that the pandemic has had a strong impact on the retail trade sector. In-line with restrictions put in place by Member States sales volumes of non-food products dropped in March and April, picking up over May and July before dropping again in November with the reintroduction of shop-closure measures in many Member States.

In France, the most important sector for movers in 2019 was construction. The number of movers employed in this sector in France fell by 11 % in 2020, whereas employment of nationals remained the same. In other major destination countries numbers of movers employed in the construction sector also fell, apart from in Austria. This tallies with data on the evolution of construction activity between February 2020 (pre-crisis) and December 2020. Data show that construction activity fell by 25 % in March and April 2020 compared to February 2020; after rebounding in May 2020, it stagnated and in December 2020 was still below pre-crisis levels[114]. The reduced employment of movers is likely related to the reduced activity seen in this sector in major EU-27 mover destination countries.

The accommodation and food services sector has been one of the sectors most affected by the pandemic due to restrictions on movement and events and the closure of hotels, restaurants and bars. At EU level, turnover, defined by the volume of sales, in the sector dropped by 58 % in the second quarter of 2020 compared to the first quarter. In the third quarter it recovered significantly as restrictions on travel and catering were loosened, before falling again in the fourth quarter[115]. In the final quarter of 2020, turnover in the sector was less than half of levels in Q4 of 2019. This pattern is visible in the quarterly data for employment of movers in the accommodation and food services sector in Spain in 2020 (see Figure 55 above). In Spain, where accommodation and food services is the sector employing the most EU-27 movers, the number of employed movers dropped by 18 %. Drops of over 23 % in movers employed in this sector were also seen in Germany and Italy. Austria saw a smaller 8 % drop. The disparity between the very large drop in turnover and the smaller drop in numbers of employed movers might be explained by use of furlough schemes to protect jobs.

Therefore, the data shows that there were drops in employment in sectors most impacted by restrictions brought in to combat the pandemic, and that mobile workers were generally affected more than the local workforce. However, changes in employment were considerably smaller than the drop in turnover. This suggests a strong cushioning effect of short-term work schemes and a degree of labour hoarding with employers that has also reached mobile workers.

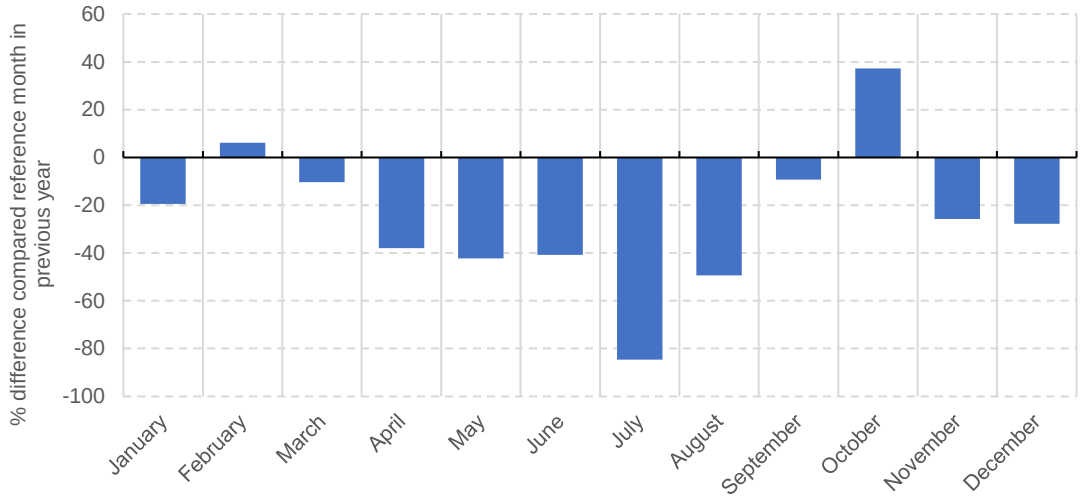
3.2.3. Evolution of supply and demand of EU-27 movers in 2020

Available data from EURES, the European job mobility portal, demonstrate the negative impact of the pandemic on the labour market, with fewer employment opportunities for

[113] Eurostat (2021), Production in industry - monthly data, table STS_INPR_M.
[114] Eurostat (2021), 'Impact of COVID-19 crisis on construction', EUROSTAT statistics explained, https://ec.europa.eu/EUROSTAT/statistics-explained/index.php?title=Impact_of_Covid-19_crisis_on_construction.
[115] Eurostat (2021), 'Impact of COVID-19 crisis on services, Eurostat statistics explained, https://ec.europa.eu/EUROSTAT/statistics-explained/index.php?title=Impact_of_Covid-19_crisis_on_services.

potential EU movers. The EURES portal allows EU citizens to search for jobs in other EU Member States and to share their CV so that it can be seen by potential employers. The data for 2020 showed a drop in the number of job vacancies notified to public employment services compared to 2019. This reached a low in July, when there was a reduction of over 80 % in the inflow of job vacancies compared to the previous year[116].

Figure 58: Annual percentage change in job vacancy inflows, EURES, 2019-2020



Source: EURES data

A similar trend is observed when looking at the quarterly job vacancy rate (JVR)[117] statistics, compiled by Eurostat[118]. A higher job vacancy rate means that there are more jobs vacant as a proportion of all posts. Figure 59 show the JVR for some EU Member States in (A) Industry, construction and services and (B) Agriculture, forestry and fishing.

[116] Data from use of EURES is used here as a tool for understanding some of the dynamics in the European labour market in 2020. However, results should be interpreted with caution and are not necessarily representative of the EU labour market. While vacancies and jobseekers for certain countries may be well represented, they may be less so in other countries.

[117] The job vacancy rate (JVR) is the number of job vacancies expressed as a percentage of the sum of the number of occupied posts and the number of job vacancies:
JVR = number of job vacancies / (number of occupied posts + number of job vacancies) x100.

[118] Eurostat (2021), "Job vacancy statistics by NACE Rev. 2 activity - quarterly data (from 2001 onward) [jvs_q_nace2]", last updated on 16/06/2021.

Figure 59: Job vacancy rate in selected sectors, 2018-2021

A. Industry, construction and services

	2018		2019		2020		2021	
	Q1	Q3	Q1	Q3	Q1	Q3	Q1	Trend
	Job vacancy rate (%)							
BG	1.0	0.9	1.0	0.8	0.7	0.9	0.8	
DE	2.9	3.0	3.3	3.2	2.6	2.2	2.9	
ES	0.7	0.7	0.7	0.7	0.7	0.6	0.7	
FR	1.2	1.1	1.3	1.2		1.3	1.5	
IT	1.6	1.2	1.7	1.2	0.7	0.9	1.5	
NL	2.8	3.0	3.2	3.2	2.6	2.5	3.0	
AT	2.8	3.0	3.1	3.0	2.9	2.5	2.8	
PL	1.2	1.2	1.1	1.1	0.6	0.7	0.9	
RO	1.2	1.3	1.2	1.1	0.9	0.8	0.8	
CH	1.4	1.4	1.5	1.5	1.3	1.3	1.4	
UK	2.6	2.8	2.6	2.7	2.4	1.6		

B. Agriculture, forestry and fishing

	2018		2019		2020		2021	
	Q1	Q3	Q1	Q3	Q1	Q3	Q1	Trend
	Job vacancy rate (%)							
BG	0.8	0.5	0.7	0.5	0.9	0.4	1.8	
DE	2.5	2.6	3.4	3.1	3.5	2.6	3.3	
NL	2.1	1.9	2.6	2.0	2.0	1.7	2.2	
PL	0.6	0.8	0.6	0.4	0.4	0.5	0.8	
RO	0.6	0.6	0.7	0.6	0.4	0.5	0.4	

Source: Eurostat Job vacancy statistics by NACE Rev. 2 activity - quarterly data [jvs_q_nace2]

The key message seems to hold for both sectors: the number of job vacancies dropped significantly after the start of the COVID-19 crisis, which only started to recover in most countries after Q4 of 2020. This is primarily seen in sectors that are relatively stable throughout the year, such as industry, construction. In agriculture, where seasonality plays a more significant role, the effect of the COVID-19 crisis on the JVR is much less evident.

Table 23 presents the numbers of EU-27 movers and nationals recruited in the year 2020 in selected Member States that are major destination Member States for movers. Considered as a proportion of recruitment of nationals, recruitment of EU-27 movers is relatively similar across most of the selected Member States at 2-3 %. The major exception is in Austria, where the number of movers recruited was equivalent to 17 % of recruitment of nationals.

Recruitment of EU-27 movers and nationals in 2017 is shown in the table as a point of comparison. It seems that whilst there were large differences in some major destination Member States in the recruitment of movers as a proportion of nationals between 2017 and 2020, in most Member States the difference was limited.

Shortages and surpluses of workers in different occupations can be a driver of intra-EU mobility. If employers are unable to fill vacancies from the national workforce, they may look

to the EU workforce; EU workers unable to find employment in their Member State may look for work in another Member State. According to analysis of year-on-year changes to the numbers of vacancies shared with public employment services for different skill sets, there was a steep decline of 56 % in numbers of vacancies, although the changes were mostly not specific to certain sectors. Exceptions to this were health professionals and personal care workers, many of whom are healthcare assistants[119]. While the occupations listed as having severe shortages did not change greatly, shortages in healthcare-related occupations have further intensified. Occupations such as health care assistants and nursing associate professionals entered the list in 2020 and 2021, having not been listed as severe shortage occupation in 2019. Nursing was the number one severe shortage occupation in 2020 and 2021, not listed in 2019[120].

Table 23: Numbers of EU movers and nationals aged 20-64 recruited in 2017 and 2020 in selected Member States

Member State	2017			2020		
	EU-28 movers	Nationals	Recruitment of EU-27 movers as a % of recruitment of nationals	EU-27 movers	Nationals	Recruitment of EU-27 movers as a % of recruitment of nationals
Austria	49 869	276 496	18	34 058	203 470	17
Belgium	32 559	261 663	12	5 068	215 647	2
Germany	307 127	2 312 261	13	28 220	1 816 386	2
Spain	94 618	1 657 258	6	80 961	1 233 013	7
France	67 996	2 090 685	3	12 608	1 575 301	1
Italy	72 053	1 287 675	6	57 201	1 082 100	5
Netherlands	6 819	637 963	1	8 164	521 503	2
EU-27	830 723	13 330 984	6	351 358	10 433 440	3

EU aggregate: EU-27: 2020. EU-28: 2017

Figures include EU-27 movers born in their country of residence.

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

3.2.4. Changes in flows of EU-27 movers

This section looks at how inflows and outflows of EU-27 movers changed in 2020, including flows of movers returning to their country of citizenship. Comparable Europe-wide data from Eurostat on return mobility and flows of movers were not yet available for 2020 at the time of writing. Information was therefore collected from national sources and studies on return migration towards Central and Eastern European countries.

According to official data from the Bulgarian government, 558 000 Bulgarians entered Bulgaria between March and May 2020[121]. However, it is not known how many of these persons only returned to Bulgaria for Easter and planned to leave the country again when the conditions were better.

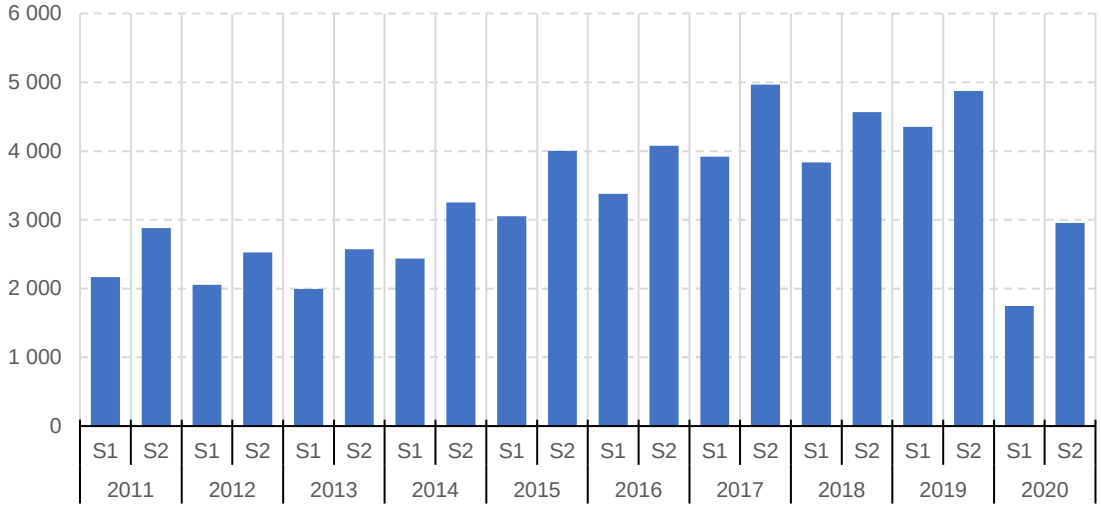
[119] McGrath, J. (2021), 'Analysis of shortage and surplus occupations 2021', European Commission, Luxembourg: Publications Office of the European Union, 2021.

[120] McGrath, J. (2020), 'Analysis of shortage and surplus occupations 2020', European Commission, Luxembourg: Publications Office of the European Union, 2020.

[121] Georgiev, O. (2020), 'The grand return: COVID-19 and reverse migration to Bulgaria', November 2020, European Council on Foreign Relations, https://ecfr.eu/wp-content/uploads/Remigration-Report-ECFR-EN.pdf.

The Romanian government has stated that 1.3 million Romanian citizens returned to the country between late February 2020 and early May 2020[122]. Without giving precise figures, the government indicated that these citizens mainly came from Italy, Spain, Germany, France and the UK, countries hosting large numbers of Romanian citizens. Around 300 000 of those returning were expected to be looking for a job. The government expected that the majority would be hoping to return abroad once the pandemic had subsided[123].

Figure 60: Inflows of returning Spanish citizens aged 20-64, from other EU countries, 2011-2020



Source: Instituto Nacional de Estadística, Table 24391 on immigration flow from abroad by semester

National migration statistics suggest that these large numbers of cross-border movements do not reflect a trend in mobility of a more long-term nature. Preliminary conclusions from Spanish and German data suggest that return mobility of a more permanent nature may have decreased during the pandemic[124]. In Germany, there was a 6 % decrease in the number of Germans returning from other EU Member States in 2020 compared to 2019, following a period of slow decrease (-1 % to -2 % per year) since 2009.The number of Spanish citizens returning to Spain in the first half of 2020 was 64 % smaller than in the previous six months. In the second half of 2020 there was a rebound, but the number of movers returning was still 39 % down compared to before the pandemic. In Spain this followed a trend of increasing inflows of returning Spanish citizens that had begun in 2013 (see Figure 60).

Data on the outflows of foreign citizens from these countries also show a significant drop in numbers leaving in 2020 compared to 2019. The number of foreign citizens leaving Spain

[122] Agerpres (2020), Video Orban Din 23 Februarie s-au Întors în Tară 1.279.000 de Cetăteni Români, 4 May 2020, https://www.agerpres.ro/politica/2020/05/04/video-orban-din-23-februarie-s-au-intors-in-tara-1-279-000-de-cetateni-romani--498675.

[123] Dobreanu, C. (2020), 'Ce perspective sunt pentru românii rămași fără locuri de muncă. „Piața muncii nu are, în acest moment, 300.000 de posturi disponibile', 7 May 2020, Radio Europa Liberă – România, https://romania.europalibera.org/a/ce-perspective-sunt-pentru-romanii-ramasi-fara-locuri-de-munca-piata-muncii-nu-are-300-000-de-posturi-disponibile-/30597729.html.

[124] Data were only available for Germany and Spain for 2020 at the time of writing. National migration statistics are based on changes in the population register; they therefore indicate movement of at least several months.
Note that this data cannot be directly compared to the data from Eurostat migration statistics used in section 1 of this report (inflows and outflows), because it comes from different sources:
German statistics are from Destatis Table 12711-0008 on migration between Germany and abroad https://www-genesis.destatis.de/genesis/online?sequenz=tabelleErgebnis&selectionname=12711-0008#abreadcrumb
Spanish statistics are from Instituto Nacional de Estadística. Statistics on inflows of Spanish citizens to Spain are from Table 24391 on immigration flow from abroad by semester. https://www.ine.es/jaxiT3/Tabla.htm?t=24391&L=1 ; Statistics on outflow of foreign citizens from Spain are from Table 24399 on emigration flow abroad by semester. https://www.ine.es/jaxiT3/Tabla.htm?t=24399&L=1.

for another EU country went from 35 000 in the second half of 2019 to 20 000 in the first half of 2020 (-43 %)[125]. This follows a general trend of decreasing outflows of foreign citizens from Spain since 2012, albeit interrupted by a sharp increase in the first semester of 2017. As with the return of Spanish nationals to Spain, there was a small rebound in the second half of 2020 compared to the first half, but it still remained 32 % less than before the pandemic. Whilst some of these foreign citizens may have gone to another EU country, it is likely that many will have returned to their country of origin. This is because individual nationalities showed a similar pattern, including for those countries that are major sending countries of EU movers but not major destination countries. The number of foreign nationals leaving Spain for Romania in the first half of 2020, for example, declined by 41 % compared to the second half of 2019. The number leaving in the second half of 2020 declined by 27 % compared to the second half of 2019.

The outflow of foreign citizens from Germany to other EU Member States decreased by 22 % in 2020 compared to 2019, from 620 000 to 480 000[126]. This followed annual increases in the outflows of foreign citizens from Germany to other EU Member States in the previous two years. Outflows of foreign citizens to Romania had been increasing steeply since 2013, but showed a decreased of 22 % (41 000) in 2020 compared to 2019. Outflows of foreign citizens to Poland decreased by 25 % (31 000) after remaining relatively stable for several years; and outflows to Bulgaria and Italy decreased by 21 % and 26 % respectively following gentle upward trends since 2012 (Table 24).

Table 24: Outflows of foreign citizens from Germany to selected countries, 2011-2020

	2011	2016	2017	2018	2019	2020	Trend
Outflows of movers from Germany (thousands)							
Romania	59	156	151	176	189	148	
Poland	99	132	114	122	125	94	
Bulgaria	29	53	49	56	63	49	
Italy	20	39	37	39	43	32	
Change compared to previous reference year (%)							
Romania		165	-3	16	8	-22	
Poland		33	-13	7	3	-25	
Bulgaria		82	-8	15	12	-21	
Italy		91	-5	5	10	-26	

Source: Destatis Table 12711-0008 on migration between Germany and abroad.

Data on outflows of nationals from Germany and Spain as well as inflows of EU-27 movers to those countries suggest that the pandemic led to less movement of EU citizens to other Member States. This mirrors the trend seen with return mobility.

In Germany, the outflow of German citizens to other Member States dropped by 15 % in 2019. This followed two years of growth in outflows. In Spain, there was an 18 % annual decrease in Spanish citizens moving to other Member States.

Inflows of EU-27 movers to Spain fell by 31 % in 2020, compared to annual changes of -2 % and -3 % in 2018 and 2019. This was the case for both Romanians and Italians, the main nationalities of origin. In Germany, annual inflows of foreigners from EU-27 Member States

[125] Spanish statistics only distinguish between Spanish citizens and non-Spanish citizens, when combined with previous/ next country of residence.

[126] German statistics only distinguish between German citizens and non-German citizens, when combined with previous/ next country of residence.

fell by 19 %, compared to 6 % in 2019[127]. Table 25 shows the development since 2011 of inflows to Germany of foreign citizens from Romania, Poland, Bulgaria and Italy.

While these changes suggest that the pandemic did influence the flows of movers between EU Member States, the data does not show a collapse of movement, implying that people continued to move despite the pandemic and the extensive governmental restrictions making movement more difficult. It should also be noted that longer-term consequences of the pandemic on choices of mobile workers are yet to be seen.

Table 25: Inflows of foreign citizens to Germany from selected countries, 2011-2020

	2011	2016	2017	2018	2019	2020	Trend
Inflows of movers from Germany (thousands)							
Romania	95	212	219	238	229	185	
Poland	163	159	149	143	128	101	
Bulgaria	51	80	78	81	83	72	
Italy	30	63	61	63	61	43	
Change compared to previous reference year (%)							
Romania		124	3	9	-4	-19	
Poland		-2	-7	-4	-11	-21	
Bulgaria		55	-2	4	2	-13	
Italy		110	-3	3	-3	-29	

Source: Destatis Table 12711-0008 on migration between Germany and abroad.

[127] The German data refers to the previous country of residence for non-Germans. It is assumed that most of the foreigners coming from the Member States cited will be nationals of those Member States.

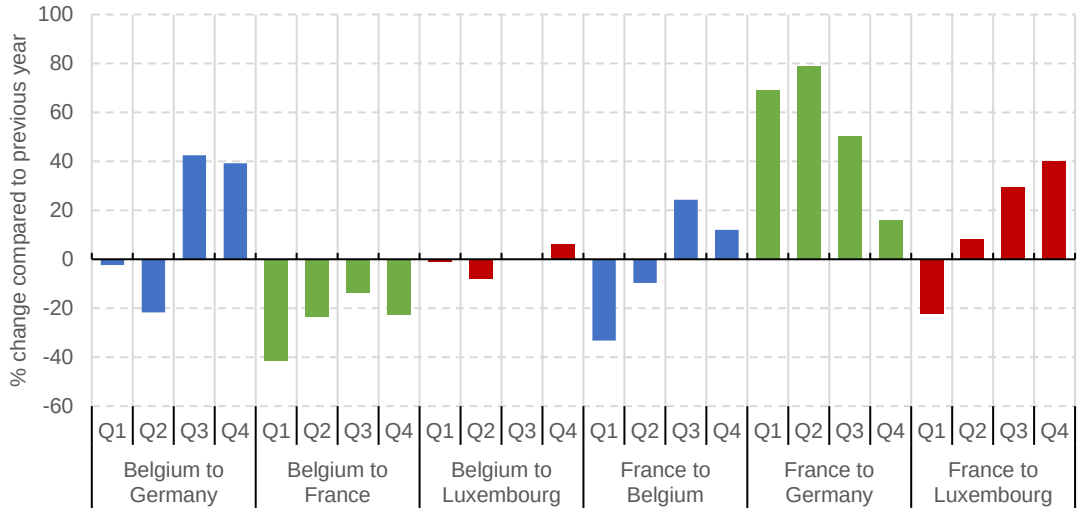
3.3. Impact of the pandemic on cross-border workers

Cross-border or frontier workers are highly mobile workers that rely on freedom of movement of workers across borders and generally benefit from the same social protection as local workers in the host country. However, the closing of borders has made their situation more precarious by potentially preventing them from reaching their place of work and or creating a necessity for temporary accommodation.

Quarterly data suggests that employment of cross-border workers followed a similar pattern to that of employment of other mobile workers during 2020. Analysis of pairings of countries with the most frontier workers showed that in around three quarters of the pairings, movement in Q2 of 2020 was less than it had been in Q2 of 2019.

There were considerable differences between different geographical areas. The Grande Région groups border-crossings between Belgium, France, Germany and Luxembourg. Figure 61 shows the year-on-year percentage change, by quarter, of numbers of cross-border workers between these countries[128]. In most cases, there was a drop in employment of cross-border workers in the first and second quarters of 2020 compared to the previous year. By the third and fourth quarters, most county pairings showed more cross-border workers employed than the previous year. The exception to this is frontier workers living in France and working in Germany, where there appears to have been a large increase in the first quarters of 2020 compared to the equivalent quarters in 2019. This might indicate that, at least in the short-term, the restrictions introduced to combat the pandemic have not unduly affected the employment of cross-border workers in this region over the course of the whole year.

Figure 61: Year-on-year percentage change in number of employed cross-border workers aged 20-64 between countries of the Grande Région, per quarter, 2019-2020



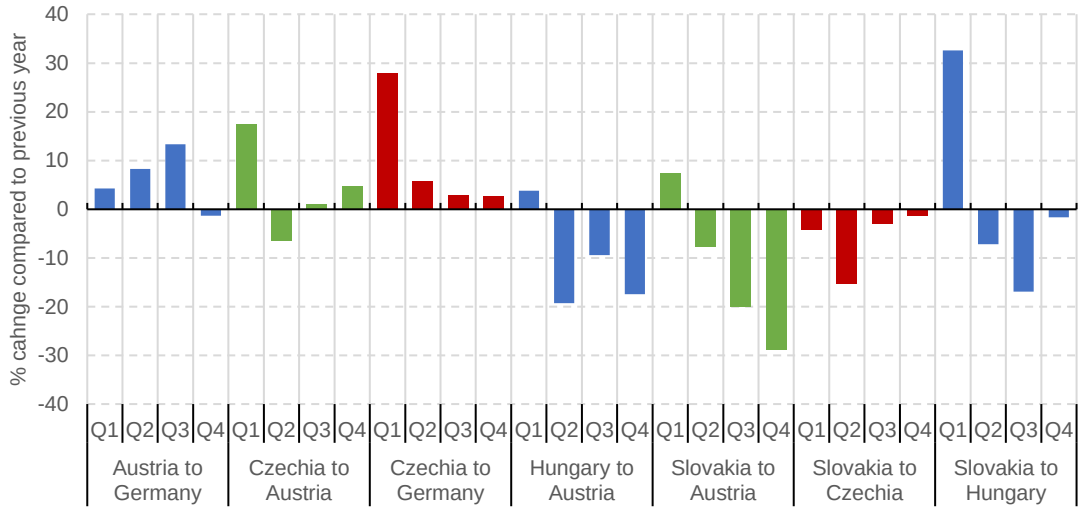
Reduced reliability for figures for frontier workers from Belgium to Germany, France to Germany and France to Belgium.
Source: Eurostat: EU-LFS, specific extractions, Milieu calculations.

As a comparison to this, Figure 62 shows the year-on-year changes in employment of cross-border workers between five Central European Member States: Austria, Czechia, Germany,

[128] As elsewhere in the chapter, quarterly data for 2020 for Germany was not available, therefore data for frontier workers living in Germany and working in Luxembourg, in France or in Belgium are not included in the graph.

Hungary and Slovakia[129]. In this geographical area, a drop in numbers of employed frontier workers is visible only from the second quarter. This differs from the Grande Région, where the fall in numbers was seen from the first quarter. In Central Europe there is also little to no recovery in the third and fourth quarters of 2020. These results might suggest that the effects of the pandemic were felt in some Central Europe Member States later than in the Grande Région Member States.

Figure 62: Year-on-year percentage change in number of employed cross-border workers aged 20-64 between selected Central European countries, per quarter, 2019-2020



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

[129] Country pairings analysed and shown in the graph are those for which there is a sufficient number of cross-border workers for there to be reliable data. As in the previous example, data for cross-border workers living in Germany and working in another country were not available.

3.4. Impact of the pandemic on short-term movers and seasonal workers

Seasonal work is a form of highly-mobile labour mobility. Seasonal workers are most frequently employed on fixed-term contracts in the country of work, either directly at the place of work or through a temporary work agency. They may also enter a work contract in their home country and then be posted to the country where the work takes place.

Intra-EU labour mobility for seasonal work has been particularly prevalent in the public debate in both Western and Eastern European Member States[130]. For example, in April 2020, a report from Czechia stated that around 5 000 additional workers were required for the harvest from April-June[131]. In Belgium, agricultural industry associations warned of a shortfall of 15 000 to 20 000 workers[132]. In Germany, the shortfall estimated was 280 000, mostly from Central and Eastern European countries[133]; in Italy, 370 000, 105 000 of those from Romania; and in France 200 000, coming from Spain and third countries in North Africa[134].

Countries attempted to partially address these shortfalls through national recruitment drives to encourage those who were unable to work due to the COVID restrictions, or who were unemployed prior to the pandemic, to take up temporary work in the agricultural sector. The remaining shortfall was resolved by allowing exceptions to freedom of movement, including chartering flights to bring in seasonal agricultural workers. Some countries, such as Germany or Belgium, made changes to labour law to incentivise seasonal workers staying in the country and reduce social security contributions of employers on seasonal workers[135],[136]. In Italy, a government decree aimed to regularise the large numbers of undocumented migrants[137]. Countries chartering flights to allow seasonal workers to arrive in the country included Germany, where derogation from COVID restrictions on freedom of movement was granted for the months of April and May 2020 by the government for 80 000 seasonal workers in agriculture, forestry and horticulture[138]. In Austria, both seasonal agricultural workers and care workers were flown in chartered flights during the early months of the pandemic. Austria began a night-train service in early May 2020 to transport

130 European Migration Network (2020), 'Attracting and protecting the rights of seasonal workers in the EU and the United Kingdom – Synthesis Report', Brussels: European Migration Network.

131 Mikulasova, J. (2020) 'COVID-19 Impact – Seasonal Agricultural Workers Missing in Czech Agriculture', United States Department of Agriculture, https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=COVID-19%20Impact%20-%20%20Seasonal%20Agricultural%20Workers%20Missing%20in%20Czech%20Agriculture%20_Prague_Czech%20Republic_04-13-2020.

132 VRT News (2020), 'Between 15,000 and 20,000 too few seasonal workers', 4 May 2020, https://www.vrt.be/vrtnws/en/2020/05/04/between-15-000-and-20-000-too-few-seasonal-workers/.

133 IOM (2020) 'COVID-19: Policies and Impact on Seasonal Workers', COVID-19 Response Issue Brief #1, https://www.iom.int/sites/default/files/documents/seasonal_agricultural_workers_27052020_0.pdf.

134 Foote, Natasha (2020), 'COVID-19 measures could cause 'devastating' labour shortage in EU farming', Euractiv, 25 March 2020, https://www.euractiv.com/section/agriculture-food/news/covid-19-measures-could-cause-devastating-labour-shortage-in-eu-farming/.

135 Der Spiegel (2020), 'Bundesregierung erleichtert Saisonarbeit in der Landwirtschaft', 23 March 2020, https://www.spiegel.de/wirtschaft/soziales/corona-krise-bundesregierung-lockert-regeln-fuer-erntehelfer-a-83653242-0ebe-428a-b3c7-a86ab218d8d9.

136 Arrêté royal n° 5 du 9 avril 2020, pris en exécution de l'article 5, § 1, 5°, de la loi du 27 mars 2020 accordant des pouvoirs au Roi afin de prendre des mesures dans la lutte contre la propagation du coronavirus COVID-19 (II), en vue d'adapter certaines règles applicables dans les secteurs de l'agriculture et de l'horticulture.

137 ETUC (2020), 'COVID-19 watch ETUC briefing note: Seasonal workers', 29 May 2020, https://www.etuc.org/sites/default/files/publication/file/2020-05/Covid-19%20Briefing%20Seasonal%20Workers%20Final_updated%2029%20May%202020.pdf.

138 Der Spiegel (2020), 'Erntehelfer dürfen nun doch nach Deutschland kommen', 2 April 2020, https://www.spiegel.de/wirtschaft/soziales/corona-krise-erntehelfer-duerfen-nun-doch-nach-deutschland-kommen-a-4a7360a8-8151-40a1-93bc-6c960fb18cbb.

care workers for vulnerable people into the country[139]. In France, restrictions on entry for seasonal workers were only softened on 20 May[140].

Countries of origin in several cases expressed concerns about short-term mobility. They feared that workers could have the virus when returning home after completing seasonal work abroad and thus infect vulnerable members of their household[141],[142]. However, already in early April 2020, seasonal workers were largely exempted from travel restrictions[143].

Table 26 presents estimated numbers of seasonal workers in the EU Member States focused on in this chapter. It also presents available information on the derogations to COVID-19 restrictions on freedom of movement accorded by these Member States to allow seasonal workers from other Member States to enter during the early months of the pandemic.

Table 26: Numbers of seasonal workers with available information in 2020 derogations

Member State	Estimate of usual number of seasonal workers annually[144]	Available information on Recruitment of EU-27 movers through travel corridors in 2020	Period
Belgium	50 000	15 000 seasonal workers estimated to have come to Belgium between March and June 2020, majority from CEE[145].	March – June 2020
Spain	73 000	Many seasonal workers in agriculture are recruited from Morocco, rather than other EU MS[146].	
Germany	280 000 [mostly from EU Member States, particularly Romania and Poland]	40 000 [80 000 permitted][147]	April – May 2020
France	115 000	Many seasonal workers in agriculture are recruited from Morocco,	

139 Reuters (2020), 'Austria sets up night train service to bring care workers from Romania', 23 April 2020, https://www.reuters.com/article/health-coronavirus-austria-care-idUSL5N2CB826

140 French government (2020), 'Contrôle aux frontières - situation des travailleurs saisonniers et des travailleurs en détachement', 20 May 2020 https://www.legifrance.gouv.fr/download/pdf/circ?id=44977.

141 Bulgarian National Radio (2020), 'Bulgarian seasonal workers infected with COVID-19 return from abroad', 5 June 2020, https://bnr.bg/en/post/101271110/bulgarian-seasonal-workers-infected-with-covid-19-return-from-abroad.

142 Die Presse (2020), 'Rumänien verhindert Flug mit Pflegekräften nach Österreich', 9 April 2020, https://www.diepresse.com/5798484/rumanien-verhindert-flug-mit-pflegekraften-nach-osterreich.

143 Krakovsky, R. (2020), 'Growing Intra-EU Migrations in the Era of Coronavirus?', 18 May 2020, Institut Montaigne, https://www.institutmontaigne.org/en/blog/growing-intra-eu-migrations-era-coronavirus.

144 These estimates are taken from: Fries-Tersch, Sioland et al. (2021), 'Intra-EU mobility of seasonal workers: Trends and challenges', European Commission Directorate-General for Employment Social Affairs and Inclusion, March 2021, Luxembourg: Publications Office of the European Union….
Fries-Tersch, Sioland et al. (2020), 'Intra-EU mobility of seasonal workers: Trends and challenges', European Commission Directorate-General for Employment Social Affairs and Inclusion, March 2021, Luxembourg: Publications Office of the European Union.

145 Correspondence with Boerenbond, Farmers association in Belgium.

146 Hooper and le Coz (2020), 'Seasonal Worker Programmes in Europe: Promising practices and ongoing challenges', Migration Policy Institute, February 2020, https://www.migrationpolicy.org/sites/default/files/publications/MPIE-Seasonal-Workers-Policy-Brief-Final.pdf.

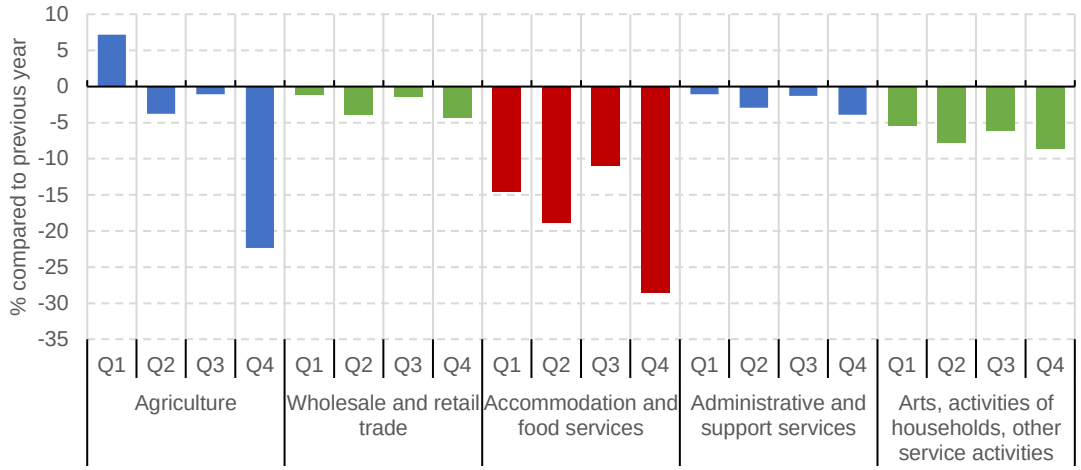
147 Karoline Popp (2020), 'Seasonal migration and COVID-19: undercounted, undervalued and underprotected', Migration Data Portal, 11 August 2020, https://migrationdataportal.org/blog/seasonal-migration-and-covid-19-undercounted-undervalued-and-underprotected.

Member State	Estimate of usual number of seasonal workers annually[144]	Available information on Recruitment of EU-27 movers through travel corridors in 2020	Period
		rather than other EU MS[148].	
Italy	123 000 [primarily Romania, Poland and Bulgaria]	15 000 [from Romania to Veneto region][149]	April – June 2020

Sources: See references in table.

Data from Germany for workers on short-term contracts in 2020 showed annual decreases in all the major sectors for short-term work. Figure 63 demonstrates year-on-year changes per quarter in employment of EU-28 movers on short-term contracts.

Figure 63: EU movers in marginal employment, main sectors, Germany year-on-year change by quarter, 2019-2020



EU aggregate: EU-28

Marginal employment includes contracts with a maximum salary of 450 euros and short-term employment contracts.

Source: Bundesagentur für Arbeit, Tabelle: Beschäftigte nach Staatsangehörigkeiten (Quartalszahlen).

It appears that decreases compared to 2019 generally followed a pattern seen elsewhere in this chapter: a significant decrease in the second quarter, coinciding with the strict measures brought in at the beginning of the crisis, followed by a rebound in quarter three as measures were relaxed over summer, then another decrease in quarter four with the second wave of restrictions. Both the agriculture and accommodation and food services sectors show this pattern, but the agriculture sector shows a severe decrease in Q4 compared to Q4 in 2019. The accommodation and food services sector consistently shows large drops in the number of EU overs working on short-term contracts throughout the year.

[148] Hooper and le Coz (2020), 'Seasonal Worker Programmes in Europe: Promising practices and ongoing challenges', Migration Policy Institute, February 2020, https://www.migrationpolicy.org/sites/default/files/publications/MPIE-Seasonal-Workers-Policy-Brief-Final.pdf.

[149] Krakovsky, R. (2020), 'Growing Intra-EU Migrations in the Era of Coronavirus?', 18 May 2020, Institut Montaigne, https://www.institutmontaigne.org/en/blog/growing-intra-eu-migrations-era-coronavirus.

In Italy, the number of seasonal workers from other EU Member States decreased most strongly in the services sector (29 %, see Table 27). Overall, the number of seasonal workers in Italy from other EU Member States dropped by over a fifth (22 %) in 2020 compared to 2019. The number of seasonal work contracts held by EU movers fell by a similar proportion (23 %). Employment for EU movers in the Italian agricultural sector appears to have been less strongly hit, but still decreased by 17 % compared to the previous year. The services sector is likely to include work in the accommodation and food services sector, one of the sectors most affected by the pandemic restrictions.

Table 27: Annual change in number of EU seasonal workers and seasonal work contracts held by EU movers, Italy, 2019-2020

Sector	Seasonal workers (%)	Seasonal work contracts (%)
Total	-22	-23
Agriculture	-17	-16
Industry	-8	-18
Services	-29	-23

Source: Ministry of Labour and Social Policies - Statistical Information System of Mandatory Communications.

In Spain, the number of EU-28 movers doing seasonal work in the agricultural sector fell by 7 % in 2020 compared to 2019[150]. Data is not available for EU movers doing seasonal work in other sectors. However, the number of persons employed by temporary work agencies in the accommodation and food services sector fell by 79 % compared to 2019. Overall, the number of *foreigners* working in Spain as seasonal workers decreased by 9 % (this includes all non-Spanish workers, not just EU mobile workers).

A major concern raised has been the living and working conditions of mobile seasonal workers[151]. They often live in accommodation provided by the employer at or near the place of work. Trade unions have noted that this accommodation is often overcrowded and bad, making social distancing impossible[152]. Equally, numerous sources have described cases of seasonal workers as not benefiting from sufficient preventative measures against COVID-19 whilst at work[153]. Mobile seasonal workers are seen as being a vulnerable group with relation to COVID-19 and may have difficult access to healthcare in the country of work[154].

Several cases indicate that these concerns were realised. This includes the death of a Romanian seasonal agricultural worker in Germany[155] and an outbreak of COVID-19 amongst at least 200 Romanians working in a slaughterhouse of the largest meat producer in Germany[156]. Part of the issue appears to be related to the sometimes multiple layers of subcontracting separating employee from employer. This issue has been brought into the

150 Ministry of Labour and Social Economy, General Directorate for Statistics and Socioeconomic Analysis, Sheet AEX-6, Foreign workers affiliated with the social security system, by sector and nationality.

151 ETUI contributors (2020), 'Essential but unprotected: highly mobile workers in the EU during the Covid-19 pandemic', ETUI, The European Trade Union Institute, 05 November 2020, available at https://www.etui.org/publications/essential-unprotected-highly-mobile-workers-eu-during-covid-19-pandemic (accessed June 18, 2021).

152 ETUC (2020), 'COVID-19 watch ETUC briefing note: Seasonal workers', 29 May 2020, https://www.etuc.org/sites/default/files/publication/file/2020-05/Covid-19%20Briefing%20Seasonal%20Workers%20Final_updated%2029%20May%202020.pdf.

153 Palumbo and Corrado (eds.) (2020), 'COVID-19, agri-food systems and migrant labour', Open Society Foundations, July 2020, https://www.opensocietyfoundations.org/publications/are-agri-food-workers-only-exploited-in-southern-europe.

154 European Centre for Disease Control (2020), 'COVID-19 clusters and outbreaks in occupational settings in the EU/EEA and the UK', 11 August 2020, https://www.ecdc.europa.eu/sites/default/files/documents/COVID-19-in-occupational-settings.pdf.

155 Bohr and Ulrich (2020), 'Rumänischer Erntehelfer nach Corona-Infektion gestorben', 15 April 2020, Der Spiegel, https://www.spiegel.de/panorama/gesellschaft/coronavirus-rumaenischer-erntehelfer-in-baden-wuerttemberg-nach-corona-infektion-gestorben-a-7ca0532c-6acd-49b3-b443-bcb806816bb7.

156 Bucui, L. (2020), 'Cel puţin 200 de români infectaţi cu COVID-19 la un abator din Germania', 28 April 2020, MediaFax, https://www.mediafax.ro/social/cel-putin-200-de-romani-infectati-cu-covid-19-la-un-abator-din-germania-despre-ce-firma-este-vorba-19103613.

political discussion in Germany, with protests by Romanian seasonal workers and intervention from the Romanian ambassador[157]. Comparable so mostly smaller outbreaks were reported in several meat processing plants in particular in Germany and the Netherlands[158]. In the Netherlands, there were cases of inspections temporarily halting work in some farms after finding that Romanian and Polish movers were working between 8 and 14 hours per day, seven days per week, in sanitary conditions that were deficient[159]. In Spain, cases were reported of outbreaks affecting 900 fruit-picking workers in Catalonia and a further 38 cases in Murcia, as well as in a meat-packing factory in Valencia[160].

In response to the rising concern over the working and living conditions of seasonal workers during the pandemic, a joint declaration was made in May 2020 by representatives of workers and employers in the agricultural sector regarding minimum standards for seasonal workers to be respected across the EU[161]. This declaration included assurance from employers that they would ensure that adequate health and safety measures, including social distancing and provision of protective equipment and hygiene products, would be applied both in workplaces and accommodation.

The European Commission addressed the greater visibility given by the pandemic to the working conditions of seasonal workers with a set of guidelines on seasonal work, published in July 2020[162]. The European Parliament has called on the Commission and Member States to better recognise the contribution of mobile workers in strategic manufacturing supply chains by reviewing requirements for quarantine for these workers where there is not a risk to public health[163] and in October 2020 the Council recommended to Member States not to impose quarantine requirements on these workers.[164]

[157] DIGI 24 (2020), 'Muncitorii sezonieri români fac istorie în Germania. Hurezeanu: Legea muncii va fi schimbată după scandalurile din ferme și abatoare' 19 May 2020, digi24.ro/stiri/actualitate/muncitorii-sezonieri-romani-fac-istorie-in-germania-hurezeanu-legea-muncii-va-fi-schimbata-dupa-scandalurile-din-ferme-si-abatoare-1309770.

[158] Romanian Ministry of Foreign Affairs (2020), Press release 21 May 2020, http://www.mae.gov.ro/node/52578.

[159] Ministry of employment and social affairs Netherlands (2020), 'Zevendaagse werkweken bij aspergekweker', 17 June 2020, https://www.inspectieszw.nl/actueel/nieuws/2020/06/17/zevendaagse-werkweken-bij-aspergekweker.

[160] European Centre for Disease Control (2020), 'COVID-19 clusters and outbreaks in occupational settings in the EU/EEA and the UK', 11 August 2020, https://www.ecdc.europa.eu/sites/default/files/documents/COVID-19-in-occupational-settings.pdf.

[161] Joint declaration of the European social partners of agriculture – GEOPA-COPA and EFFAT – on the deployment of seasonal workers from European countries in the EU https://ec.europa.eu/social/main.jsp?catId=521&langId=en&agreementId=5660

[162] Communication from the Commission Guidelines on Seasonal Workers in the EU in the Context of the COVID-19 Outbreak, C(2020) 4813 final, https://ec.europa.eu/info/sites/default/files/guidelines_on_seasonal_workers_in_the_eu_in_the_context_of_the_covid-19_outbreak_en.pdf.

[163] European Parliament resolution of 20 May 2021 on impacts of EU rules on the free movements of workers and services: intra-EU labour mobility as a tool to match labour market needs and skills (2020/2007(INI)), line 14.

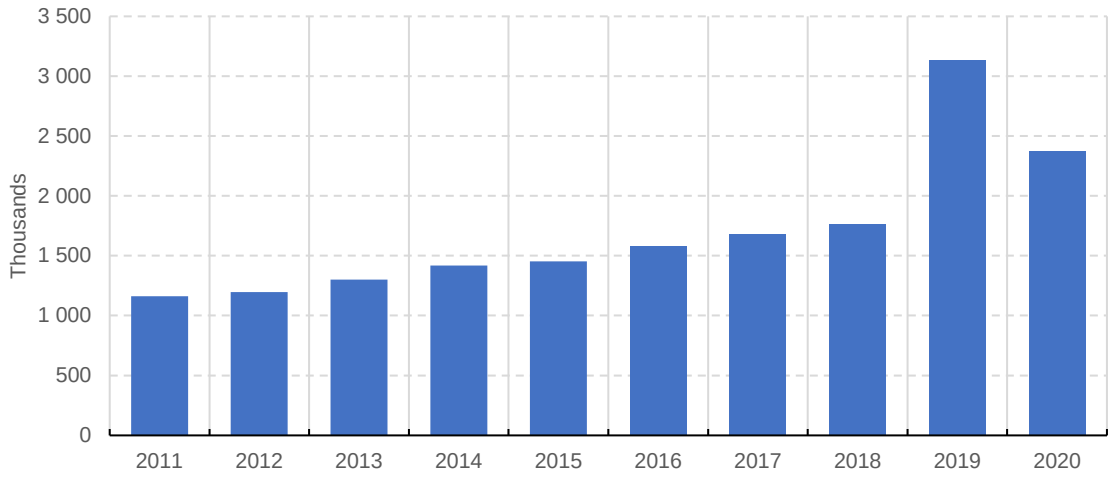
[164] Council Recommendation (EU) 2020/1475 of 13 October 2020 on a coordinated approach to the restriction of free movement in response to the COVID-19 pandemic https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02020H1475-20210202.

3.5. Impact of the pandemic on posted workers

Restrictions on movement during the COVID-19 pandemic necessarily affected posting of workers to other Member States, as activity in some sectors not considered as 'essential' decreased along with ease of movement to other Member States.

Numbers of postings of workers are estimated by counting the Portable Document A1 forms issued by Member States during a given year. These forms are requested from Member States by employers or self-employed persons when organising a posting of a worker to another Member State or several other Member States. The form establishes that a person is affiliated to the social security system of the Member State that issues the certificate and thereby confirms that the person is free of the obligation to pay contributions in the other Member State(s) whilst working there. It should be noted that not all postings are reported to the relevant authorities, which means that the data should be taken as indicative[165].

Figure 64: Numbers of PD A1 forms issued for postings of workers by EU27 countries, 2011-2020



PD A1 forms issued under Article 12 of the Basic Regulation

Source: Administrative data PD A1 Questionnaire 2021 and previous years

In 2020 the total number of PD A1 forms issued for postings in EU-27 Member States decreased by 24 % compared to 2019[166] (Figure 64). This shows a significant departure from the trend of growth in the number of PD A1 issued for postings over the previous decade, as shown in Figure 64. The number of forms issued for postings in 2020 was 2.37 million, compared to 3.14 million in 2019. Nevertheless, the number of forms issued in 2020 was still higher than the number issued in 2018.

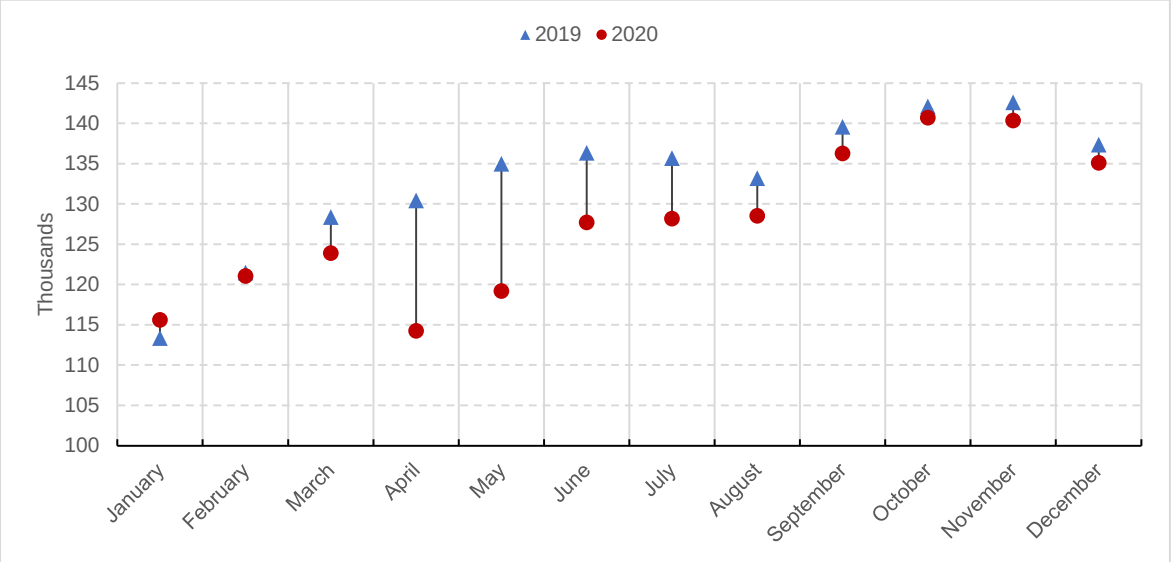
Most PD A1s are issued under Article 12 of Regulation (EC) No 883/2004 of 29 April 2004 on the coordination of social security systems (also referred to as Basic Regulation). Forms issued under Article 12 cover posting of an employed or self-employed person to another (single) Member State. A smaller but important portion are issued under Article 13 and cover an employed or self-employed person working in two or more Member States.

[165] In some cases accuracy of data may be linked to the numbers of inspections taking place. For more information, see: De Wispelaere, De Smedt and Pacolet (2021), *Posting of workers: Report on A1 Portable Documents issued in 2020*, Network Statistics FMSSFE, on behalf of the European Commission - DG EMPL.

[166] This refers to PD A1 forms issued under **Article 12** of Regulation (EC) No 883/2004 of 29 April 2004 on the coordination of social security systems

Whereas the PD A1s issued under Article 12 decreased by 24 %, the number of PD A1s issued under Article 13 decreased by (only) 7 %. Many Article 13 PD A1s are associated with transport of goods, a sector in which workers are often required to move between several Member States. The sector was considered essential during the COVID-19 pandemic and therefore not subject to the same restrictions as many other sectors. This may explain why the number of Article 13 PD A1s decreased proportionally less than the Article 12 PD A1s.

Figure 65: Persons reported by Belgian authorities who worked at least one day in Belgium during the reference month, 2019-2020



Includes employed people sent to work on a temporary or part-time basis in Belgium, hired in a country outside Belgium, or self-employed people carrying out a temporary activity in Belgium not residing permanently nor settled in Belgium.

Source: LIMOSA database, Belgium

Freight transport workers were quickly recognised as essential workers by EU Member States and the European Commission in order to ease the transportation of goods across the EU[167], including establishment of green lanes following a communication from the Commission in March 2020.[168] These measures were taken in order to reinforce the supply of essential goods including food and medical supplies. The changes in conditions nevertheless affected the working conditions of road hauliers with the relaxation of maximum working-time rules. EU Member States introduced temporary relaxations to rules on social conditions of haulage drivers under Regulation 561/2006. These relaxations were different in different countries, with rules being changed to extend or remove maximum daily, weekly and fortnightly driving limits and reduce or postpone requirements on rest periods. Additionally, rules on rest periods were changed to allow drivers to remain in their

[167] European Commission (2020), "COVID-19. Guidelines for border management measures to protect health and ensure the availability of goods and essential services", C(2020) 1753 final, Brussels, 16.3.2020, para. 21. https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52020XC0330(03).

[168] Communication from the Commission on the implementation of the Green Lanes under the Guidelines for border management measures to protect health and ensure the availability of goods and essential services, C(2020) 1897 final, https://ec.europa.eu/transport/sites/default/files/legislation/2020-03-23-communication-green-lanes_en.pdf.

vehicles for their weekly rest period[169]. Nearly all of these measures were taken between mid-March 2020 and the end of May 2020[170].

Looking across the year on a month-by-month basis, the example of Belgium suggests that, as with other forms of labour mobility, there was a drop in the numbers of people working as posted workers in line with the levels of government restrictions[171]. As Figure 65 shows, there is a deviation from the 2019 pattern for numbers of postings between March and June 2020 in particular, reaching a low point in April before picking up and stabilising from October.

[169] An updated list of temporary exceptions for each Member State was made available by the European Commission. It is still available at https://www.etf-europe.org/wp-content/uploads/2020/03/Relaxation-of-DRT-rules-19-3-2020.pdf[accessed 01/12/21].

[170] Additional measures were taken by many Member States at the end of December 2020 specifically targeting drivers travelling from the UK due to the prevalence of the Alpha variant of COVID-19 in the UK at that time.

[171] Due to unresolved doubts about accuracy of data for 2020 from German authorities and missing data from Cyprus Italy and Greece at the time of writing, Belgium is taken as an example in place of the EU aggregate.

4. Return mobility of mobile EU citizens

Return mobility is an important dimension of mobility: in many cases decisions to relocate to another country are not permanent, and upon returning to one's home country, the mover may bring along increased skills and human or financial capital. In countries such as Romania which have experienced accelerated demographic ageing in part due to younger people moving abroad, the return of workers can entail an important influx of working age labour and an increase in the tax base[172]. Return mobility has previously been studied in the 2016 Intra-EU Labour Mobility Report[173].

This chapter provides an overview of the scale and trend of return mobility of EU citizens over the past years, as well as characteristics of returnees[174]. The first section provides definitions related to return mobility . The next section offers an analysis of the broad developments in return mobility since the beginning of the past decade. The third section examines in more detail trends in return mobility by demographic groups. The fourth section focuses on the effects of Brexit on return mobility. The fifth section of the chapter provides potential explanations for trends in return mobility, looking at macro-economic developments, the situation of returnees upon return and other potential factors influencing return mobility. Last, the chapter provides an overview of different initiatives taken by Member States to incite citizens abroad to return to the country or to facilitate their return.

Key findings

Significance of return mobility phenomenon

- **Return mobility is a significant component of labour mobility in Europe, and 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, making up 21 % of total inflows across the European Union. Returnees are a distinct group of movers: living abroad for a few years 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.

Developments since 2016

- **Since 2016, return mobility has increased more for the EU-15 countries than EU-13.** EU-15 returns increased by 21 % or 92 400, while 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 %).

[172] Dospinescu, A., and Russo, G. (2018), 'Romania – Systematic country diagnosis: Background note on Migration', World Bank, Washington, D.C.

[173] Fries-Tersch, E., Tugran, T., and Bradley, H. (2017), *2016 Annual Report on Intra-EU Labour Mobility*, Network Statistics FMSSFE, European Commission, Brussels.

[174] Trends for 2020 are not discussed in this chapter due to an unclear data situation during the COVID-19 pandemic. Return mobility for 2020 is instead discussed separately in Section 3 of this report.

- **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).

- **There is no uniform 'Brexit effect' on return mobility, with patterns differing among significant countries of origin.** 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.

Notable observations

- **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 %). 20-34-year olds are the largest group of returnees in all Member States except Poland and Slovakia, where more movers are aged 34-49. Additionally 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 more particularly vulnerable to skills mismatches.

Policy action to encourage return mobility

- **Dedicated public schemes and programmes can encourage increased levels of return mobility and facilitate reintegration.** 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.

4.1. Definitions and operationalisation

There is little comparable statistical information on return mobility in the EU. Countries collect different data, and there is no shared definition of return mobility[175], therefore much of the research has been qualitative and focused on the situation in specific countries with large mobile populations.

In this chapter, return mobility is defined as returning to one's Member State of origin after a long-term stay in another country for the purpose of a long-term stay in the country of origin. 'Long-term' in this context is understood as a stay of at least 12 months. Returnees are those individuals who engage in the act of return mobility. This definition has been chosen based on considerations of measurability and in order to achieve comparable results between Member States; as well as to clearly distinguish return mobility from other types of stays abroad such as circular mobility, where movers may move back and forth multiple times between the country of origin and other Member States[176], or limited term stays abroad such as posting, or seasonal work.

Table 28: Definitions of various forms of mobility involving the return to the country of origin

Mobility type	Duration and definition	Data/estimation
Return mobility	Mobile EU citizens returning to country of origin after at least 1 year with permanent residence in another country.	Eurostat and national statistics via population registers.
Circular mobility	Workers who undertake repeated long-term stays in a country other than their country of origin, returning to the country of origin between stays. Depending on the available data, it may be difficult to discern between circular and return mobility, e.g. if a worker has recently returned, but ends up moving back to their previous country of work and residence later.	Difficult to estimate without longitudinal data; no sources currently identified.
Frontier/cross-border workers	Workers who have their permanent residence in one MS and undertake work in another MS.	Estimated annually in intra-EU mobility report based on EU-LFS[177].
Posted workers	Persons covered under Articles 12 and 13 of Regulation 883/2004, either posted to another MS on behalf of their employer; on behalf of themselves as self-employed; or employed or self-employed carrying out work in multiple MS.	Estimated annually by Network Statistics FMSSFE based on A1 Portable Documents[178].
Seasonal workers	Workers who undertake temporary work abroad during seasonal increases in labour demand, without changing permanent residence.	Estimated ad hoc in 2020 report for EC[179].

[175] OECD (2020), *Sustainable Reintegration of Returning Migrants: A Better Homecoming*. Paris: OECD, Section 2.1.
[176] United Nations Economic Commission for Europe (UNECE) (2016), 'Defining and Measuring Circular Migration: Prepared by the Task Force on Measuring Circular Migration', ECE/CES/STAT/2016/5.
[177] Most recently in Fries-Tersch, E., Jones, M. and Siöland, L. (2020), *2020 Annual Report on Intra-EU Labour Mobility*, Network Statistics FMSSFE, European Commission, Brussels, pp. 70-72.
[178] Most recently by De Wispelaere, F., De Smedt, L., and Pacolet, J. (2021), *Posting of workers: Report on A1 Portable Documents issued in 2019*, Network Statistics FMSSFE, European Commission, Brussels.
[179] Fries-Tersch, E., Siöland, L., and Jones, M. (2021), *Intra-EU Mobility of Seasonal Workers: Trends and Challenges*, Network Statistics FMSSFE, European Commission, Brussels.

Mobility type	Duration and definition	Data/estimation
Short-term mobility	Mobility spells which are shorter than 12 months, but which do not necessarily constitute circular mobility, posting of workers, or seasonal work. This may include e.g. carers in private households, contracted staff, au pairs, etc.	Difficult to estimate with available data as stays of less than one year are generally not captured by large-scale surveys.

Source: Authors' own elaboration.

Table 28 provides an overview of return mobility as understood in this chapter, compared to other forms of mobility where persons return to their country after a short period of time or more regularly. It also provides an overview of data sources and possible methods of estimating the number of persons engaged in each of these forms of mobility.

In this chapter, return mobility is largely measured based on Eurostat migration statistics, more precisely on inflows of nationals to their country of citizenship. These data were chosen because they are comparable between Member States. However, no analysis by citizenship and country of previous residence can be made due to data limitations. The data therefore also includes returnees from third countries.

4.2. Developments since 2011

To get an impression of trends in return mobility, the 2011 and 2016-2019 returnee volumes are compared. Comparison is made with 2019 as this is the latest year where EU-wide comparable data (from Eurostat migration statistics) are available. As Table 29 shows, most countries have seen an increase in absolute return numbers since 2016. A notable exception is Poland. As in 2016, the highest number of returnees are found for Romania with 135 700 returning nationals in 2019, up 36 % since 2016. Germany, the UK, France and Spain also have 50 000 returnees or more.

Table 29: Inflows of returning nationals aged 20-64, 2011 and 2016-2019

	2011	2016	2017	2018	2019	Trend
Inflows of returning nationals (thousands)						
EU-28	596	664	723	738	793	
EU-27		605	655	678	721	
AT	6	7	7	7	7	
BE	9	12	12	12	12	
BG		6	9	11	16	
CY	2	3	4	4	4	
CZ	7	4	4	4	4	
DE	59	75	88	108	115	
DK	13	14	14	13	13	
EE	2	6	7	7	6	
EL	20	22	23	23	24	
ES	22	38	48	52	53	
FI	6	5	5	6	6	
FR	82	95	87	89	89	
HR	3	6	6	6	7	
HU	5	26	29	30	30	
IE	16	21	19	23	16	
IT	20	25	28	31	46	
LT	12	12	9	14	18	
LU	1	1	1	1	1	
LV	6	3	4	3	3	
MT	1	1	1	1	1	
NL	24	27	28	29	30	
PL	83	69	70	54	50	
PT	9	11	16	16	20	
RO	115	100	124	118	136	
SE	14	13	12	11	10	
SI	2	2	2	3	2	
SK	1	1	1	1	1	
UK	58	58	67	61	72	

Breaks in series: Germany (2016, 2019), Greece (2016); provisional data: Bulgaria (2016, 2019) Poland (2016,2019), Slovakia (2016,2019); estimated data: Romania (2019), Poland (2016, 2019), Germany (2019).

Source: Eurostat, international migration statistics [migr_imm1ctz], Milieu calculations.

The countries with 50 000 or more returnees all see increases in absolute numbers compared to 2016 (with the exception of France, whose returning numbers decreased by 6 % but were relatively stable between 2017 and 2019)[180]. The most notable increases were seen for Italy (84 %), Germany (53 %) and Spain (40 %). In the EU-28, returns increased by 20 % from 663 500 in 2016 to 793 400 in 2019. Leaving out the UK numbers and only looking at the EU-27 leads to a similar increase of 19 %, from, 605 400 in 2016 to 720 900 in 2019.

For the countries where data are available[181], 2019 figures are generally higher than or similar to 2011 values. The most significant increases are seen for Spain (+142 %) and Italy (+135 %) – likely reflecting the respective economies' recovery following the 2008-2009 Great Recession – and for Germany, which increases by 94 %. The most significant decrease is seen for Poland, which decreases by 40 % from 83 000 in 2011 to 49 700 in 2019. The potential causes of this decrease, and for changes in returns more broadly, are discussed in Section 4.4 of this chapter.

Table 30: Flows of nationals aged 20-64 years in largest countries of return, 2011 and 2016-2019

	2011	2016	2017	2018	2019	Trend
Outflows of nationals (thousands)						
DE	81	175	163	161	165	
ES	39	65	62	57	56	
IT	38	86	86	89	94	
PL	162	141	127	106	102	
RO	152	169	173	163	159	
UK	130	112	111	110	128	
Inflows of nationals (thousands)						
DE	59	75	88	108	115	
ES	22	38	48	52	53	
FR	82	95	87	89	89	
IT	20	25	28	31	46	
PL	83	69	70	54	50	
RO	115	100	124	118	136	
UK	58	58	67	61	72	
Net flows of nationals (thousands)						
DE	-21	-101	-75	-52	-50	
ES	-17	-27	-14	-5	-3	
IT	-18	-61	-58	-57	-48	
PL	-79	-73	-58	-52	-52	
RO	-37	-69	-49	-45	-23	
UK	-72	-54	-44	-49	-56	

Provisional data for Poland 2014-2019, and estimated data 2016-2019; estimated data for Romania in 2015 and 2017-2019; estimated data for Germany 2014-2019 and break in series 2016-2019.

Source: Eurostat, international migration statistics [migr_imm1ctz; migr_emi1ctz]

Comparisons of two or three points in time may, however, obscure changes which have occurred in that time span. To address this, Table 30 shows the inflows, outflows and net

[180] Most of this is due to a decrease between 2016 and 2017. Return mobility to France has increased since 2017, but is in 2019 still at a lower level than in 2016.

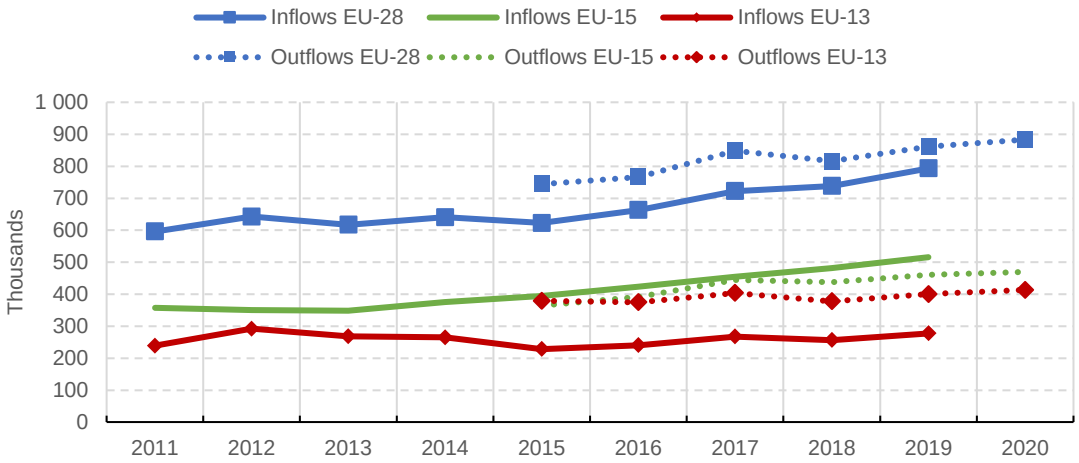
[181] 2009 figures are missing for Belgium, Bulgaria and Latvia.

flows of nationals to the largest countries of return in the 2011 and 2016-2019 period[182] (i.e. the countries with 40 000 or more returnees in 2019).

Compared with 2016, all shown Member States' returnee numbers increased except Poland (-28 %, and a -40 % change compared to 2011). Romania remains the largest returnee-receiving Member State throughout the time series, with returnees now almost at the same level as movers.

Figure 66 shows the absolute return mobility for the EU-28, EU-13 and EU-15. A notable trend here is that the EU-wide increase from 2015 onward is driven by returnees from the EU-15, rather than the more recent Member States in the EU-13. This is particularly due to large flows to Germany, France, Spain and the UK, who between them had 329 800 returning nationals in 2019. This makes up 42 % of the total ca. 793 000 returnees that year. In the EU-27, Germany, France and Spain make up 257 300 or 36 % of the total 720 915.

Figure 66: Inflows and lagged outflows of nationals aged 20-64 years in the European Union, 2011-2019



Note: Outflows are presented with a six-year lag, i.e. the 2015 outflow values are those of the year 2009. This is to observe the effect of outflows on returns over time.

In the aggregates above, data is missing for Bulgaria 2011. This affects the estimate to some degree but the impact is modest: the three countries had a total of 31 000 returnees in 2019.

Source: Eurostat, international migration statistics [migr_imm1ctz; migr_emi1ctz]

The figure also shows the outflows of nationals six years prior to the reference year – in other words, for the year 2015 in the chart, inflows are presented for 2015 and outflows for 2011. As movers will generally remain abroad for a few years prior to returning (if they return), this allows for an initial observation of how outflows affect return rates over time. The trends of in- and outflows do not follow each other exactly, but the chart nevertheless indicates a close connection between the two phenomena. As an example, a 16 % increase in EU-28 returns in 2015-2017 corresponds to a 14 % increase in outflows for the 2009-2011 period. While microdata (ideally longitudinal) is required to more closely investigate the moving journeys of individuals, this nevertheless shows that outflows indeed link closely to returnee behaviour later on. It also appears that the connection lines up most closely 5-6 years after the initial move.

[182] France is excluded from this comparison as data are not available on outflows by citizenship. For reference, inflows of nationals to France stand at 89 000 in 2019 compared to 86 000 in 2009. The period 2010-2013 saw lower levels of ca. 80 000, while 2015-2016 saw a peak of 92-95 000.

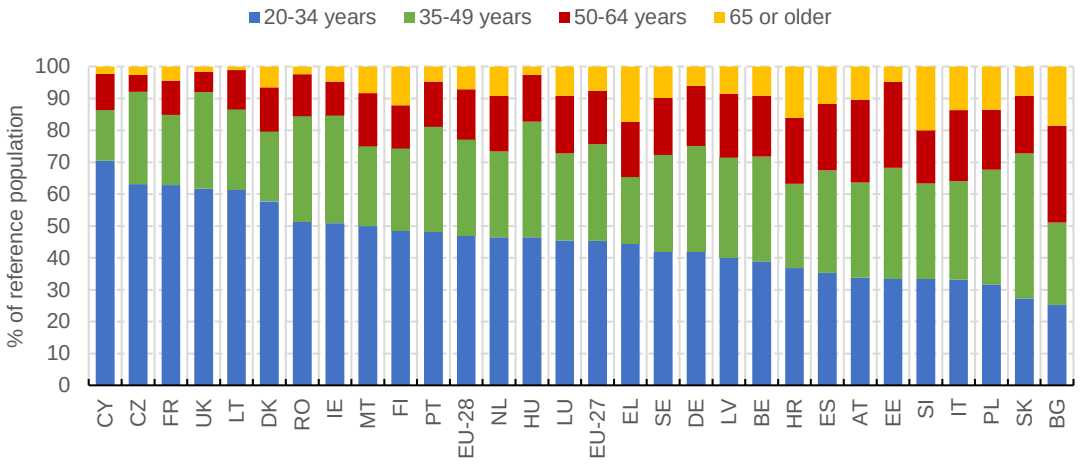
4.3. Trends by demographic groups

Previous studies have concluded that returnees in general are aged 20-34; generally men rather than women; and single rather than married[183]. Since 2011, returnees have become very slightly older on average, while the proportion of men among returnees has remained fairly constant. In terms of other demographic characteristics, most returnees (about 2/3 for all years since 2016) live in childless households and are employed (likewise about 2/3 and steady since 2016). The largest group in terms of education are highly educated, at around half of all returnees. The most notable difference over time is that returnees are getting older, with a larger proportion in the 35-49-year age bracket, which sees the largest increase both in absolute terms (+73 000 since 2011) and as a proportion of the whole (increasing from 28 % to 30 %). This change is more noticeable in the 2011-2019 span than when comparing 2016 and 2019[184]. This is linked with movers overall (and therefore the pool of returnees) becoming older.

4.3.1. Returnees by age group and gender

Figure 68, displaying the composition by sex, likewise shows that men form the larger proportion of returnees in all countries except Slovakia, France, the UK, Bulgaria, Finland and the Czech Republic. The proportion of males among returnees has remained relatively steady, since 2016, with a change of less than 1 pps. Only four countries have changes which are larger than 5 pps since 2016: the UK (-9 pps), Portugal (-8 pps), Cyprus (-6 pps) and Latvia (+11 pps). Compared with movers of the same nationality, men are overrepresented among returnees in most EU-28 Member States (the exceptions are the UK, Bulgaria, Finland and the Czech Republic).

Figure 67: Inflows of nationals aged 20 years and older by age group, 2019[185]



Breaks in series: Germany (2016, 2019), Greece (2016); provisional data: Bulgaria (2016, 2019) Poland (2016, 2019), Slovakia (2016, 2019); estimated data: Romania (2019), Poland (2016, 2019), Germany (2019).

Source: Eurostat, international migration statistics [migr_imm1ctz]

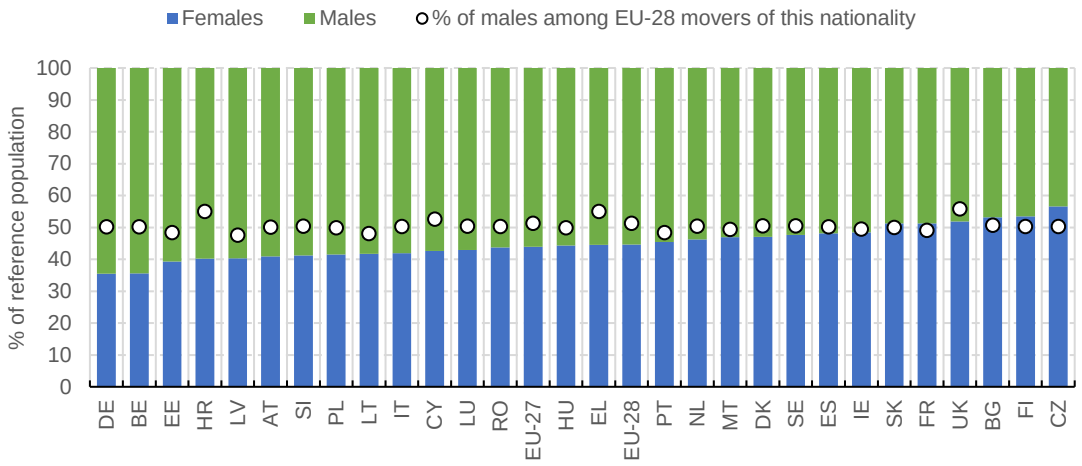
[183] E.g. Barcevičius, E., et al. (2012), *'Labour mobility within the EU: The impact of return migration'*, Eurofound, Dublin; Fries-Tersch, Tugran, and Bradley (2017).

[184] Fries-Tersch, Tugran, and Bradley (2017), pp. 101-105.

[185] Absolute values for all Member States in 2011, 2016 and 2019 are shown in **Table A 11** in **Annex B.4**.

Eurostat data can be used to investigate the composition of inflows of nationals by Member State, age group and sex. As shown in Table 31, 20-34-year-olds make up almost 50 % of returnees in the EU-28, and more than half in nine Member States. The largest proportions are found in Cyprus (70 %), the Czech Republic and the France (both 63 %), and the lowest in Slovakia (27 %) and Bulgaria (25 %). Returnees aged 65 or older are the smallest group of returnees in all Member States except Greece, where they are the same proportion as 50-64-year-olds (17 %), and in Slovenia, where they are 20 % of returnees against the 17 % made up by 50-64-year-olds[186].

Figure 68: Inflows of nationals aged 20-64 by gender, 2019



Breaks in series: Germany (2016, 2019), Greece (2016); provisional data: Bulgaria (2016, 2019) Poland (2016, 2019), Slovakia (2016, 2019); estimated data: Romania (2019), Poland (2016, 2019), Germany (2019).

Source: Eurostat, international migration statistics [migr_imm1ctz; migr_emi1ctz]

Table 31: Inflows and outflows of nationals in the European Union by age group and sex, 2011 and 2016-2019

		2011	2013	2015	2017	2019	Trend
Inflows of nationals by sex and age group, EU-28 (thousands)							
Males	20-34 years	181	171	170	189	213	
	35-49 years	103	108	113	136	151	
	50-64 years	49	56	56	66	76	
Females	20-34 years	146	151	151	174	187	
	35-49 years	74	84	86	101	108	
	50-64 years	42	48	46	57	59	
Outflows of nationals by sex and age group, EU-28 (thousands)							
Males	20-34 years	232	235	230	254	220	
	35-49 years	122	129	122	140	132	
	50-64 years	53	56	50	62	60	
Females	20-34 years	236	229	272	293	276	
	35-49 years	147	150	155	181	184	
	50-64 years	59	62	59	77	74	

Breaks in series: Germany (2016, 2019), Greece (2016); provisional data: Bulgaria (2016, 2019) Poland (2016, 2019), Slovakia (2016, 2019); estimated data: Romania (2019), Poland (2016, 2019), Germany (2019).

[186] In the Slovenian case this is from a small sample size, however, with those aged 65 or older making up 600 out of a total 3 700 – the second lowest number of returnees after Malta (1 500) and Luxembourg (1 600).

Source: Eurostat, international migration statistics [migr_imm1ctz; migr_emi1ctz]

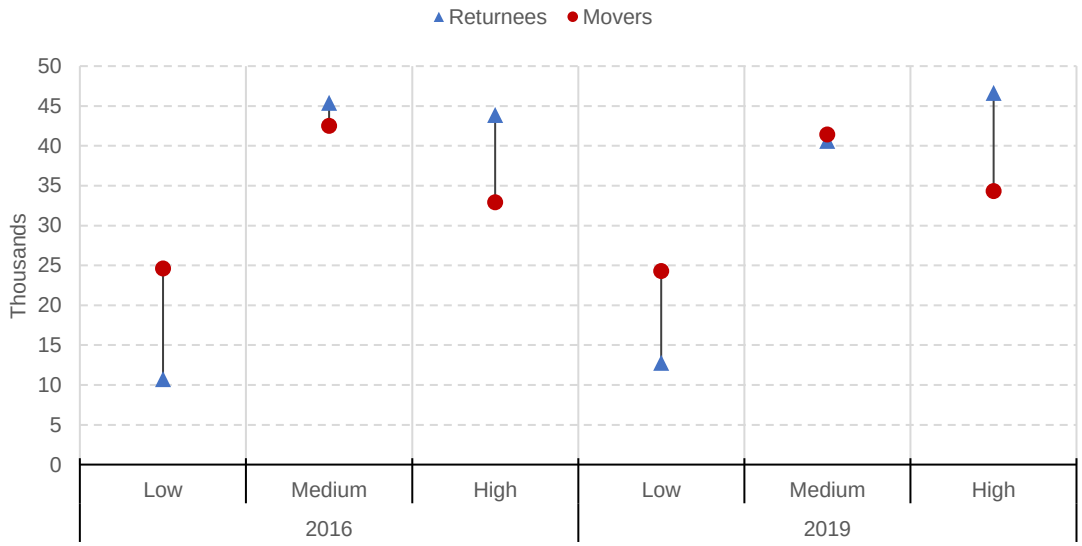
Men's over-representation among returnees is also found when looking at the proportion of returnees and movers by age group and sex (Table 31). For returnees, men remain the largest group since 2011. Meanwhile the proportion of older males has increased. The proportion of female age groups remains fairly steady, with the largest change being for 35-49-year-olds.

Comparing this to the outflows over the same time period, the main groups of departing nationals are women: over the course of 2011-2019, women aged 20-34 have replaced men of the same age as the largest departing group.

4.3.2. Returnees by education level, employment status and household composition

EU-28 aggregate trends can be found for education levels of returnees, their employment status a year after returning, and the most common household compositions they find themselves in. As shown in Figure 69, returnees with high education levels make up the largest group (except for the year 2016, when it is only one percentage point smaller than those with medium education). Returnees with low education levels make up the smallest group, at just over 10 % for the past four years.

Figure 69: Levels of education attainment among returning nationals and movers overall aged 20-64 years, 2016 and 2019



Estimates for the Low education category are of low reliability for all four years.

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

In line with the 2020 Annual Report on Intra-EU Labour Mobility, it also shows that high-educated movers are overrepresented among returnees, and are more likely to return to their home Member State than those with lower or medium education[187]: in 2019 47 % of returnees were high-educated, compared to 32 % among EU movers overall. This can either be an effect of movers having originally moved abroad for educational opportunities

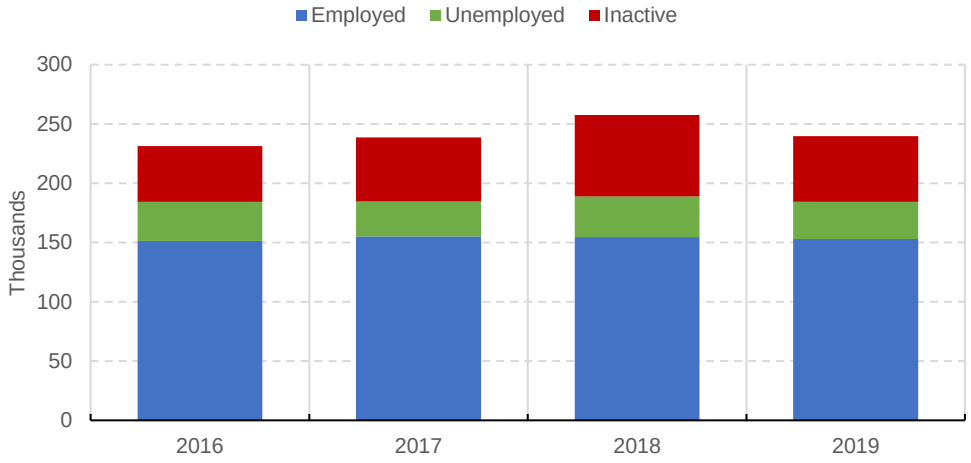
[187] Fries-Tersch, Jones and Siöland (2021), Section 3; Todisco, E. et al. (2003), 'Skilled migration: a theoretical framework and the case of foreign researchers in Italy', *Flinders University Languages Group Online Review*, Vol. 1, No. 3, pp. 115-130.

in the first place, hence returning with a higher education than when they left[188]. Another is that high-educated movers may have an easier time reintegrating in the labour market of the home Member State, especially if the experience they have attained abroad is deemed desirable by local employers (for instance in companies which work internationally, or have international customer bases)[189].

In terms of employment status after returning (Figure 70), the majority of returnees are in employment in the year after they have returned to their home Member State. Employment levels have been fairly steady since 2016 at 64-65 %, except for a 2018 dip to 60 %. The proportion of inactive returnees stands at ca. 25 % for all four years. Comparing these to non-mobile nationals and to movers as a whole, returnees have lower employment levels and higher unemployment levels; in 2019, 78 % of EU-28 movers and 74 % of non-mobile nationals were in employment. In terms of unemployment, the 12-14 % among returnees is also higher than the 7 % of EU-28 movers and 6 % of non-mobile nationals in 2019.

These differences can be explained by factors such as returnees having fewer social or professional contacts after returning, and not yet having had time to build such contacts in the year since they returned (bearing in mind that the data indicates people who arrived in the past year). By contrast, both EU-28 movers and non-mobile nationals will have been settled in their respective countries for longer, and have had more time to seek out employment. The situation of returnees in their country of origin is further discussed in Section 4.4.2 below.

Figure 70: Employment status of returning nationals aged 20-64 years in the European Union one year after returning, 2016-2019



Note: Estimates for the unemployed category are of low reliability for all four years.

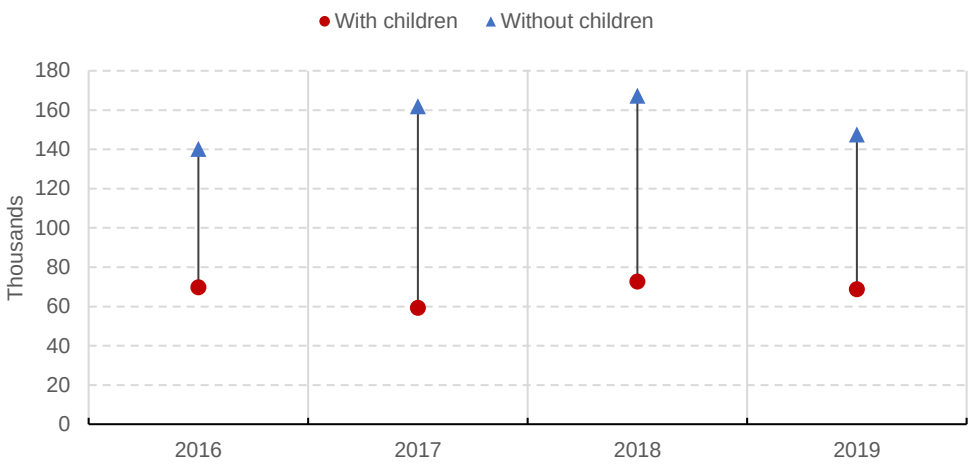
Source: Eurostat, EU-LFS, special extractions, Milieu calculations.

Turning finally to household composition, Figure 71 shows the household composition of movers who returned in the previous year. LFS data do not allow for a granular look at the household composition of returnees, but do show that most returnees are in childless households (whether as a single member of that household, as part of a couple, or as part of a household with one or more other adults who are not in a relationship): since 2016, this has constituted ca. one third of the total EU-28 returnees.

[188] This has been demonstrated e.g. for Poland: Klagge, B. and Klein-Hitpaß, K. (2007), 'High-skilled return migration and knowledge-based economic development in regional perspective. Conceptual considerations and the example of Poland', Centre of Migration Research No: 19/77.

[189] Coniglio, N.D. and Brzozowski, J. (2018), 'Migration and development at home: Bitter or sweet return? Evidence from Poland', *European Urban and Regional Studies*, Vol. 25(1), pp. 85-105; Martin, R. and Radu, D. (2012), 'Return Migration: The Experience of Eastern Europe', *International Migration*, Vol. 50, No. 6., pp. 109-128.

Figure 71: Number of returning nationals aged 20-64 years in households with and without children, 2016-2019



Note: Estimates for 1 adult, no Children is of low reliability in 2016; 1 couple with Children in 2016-2017; 1 couple, no children in 2016, 2018-2019; and 2 or more adults, not a couple, with children for all four years. Aggregates do not include 1 adult, no Children category as these values are below the reliability threshold.

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

4.3.3. Trends in return mobility from the UK since 2016

Eurostat data shows a steady downward trend of EU mobility to the UK and a plateauing of the number of mobile EU citizens in the UK. As shown in Table 32, net flows were close to 0 in 2019, down from ca. 100 000 in 2016. While data is not available for 2020 at the time of writing, it is possible that in 2020 net flows may have been negative, especially with the disruption to travel during the COVID-19 pandemic.

These data do not exclusively refer to return mobility; some of those leaving the UK may move to another EU Member State, even if many are expected to return to their country of origin. While there are official population estimates – including flows between the UK and other countries – from the Office for National Statistics (ONS), these are currently in the process of being revised for improved accuracy[190]. However, as few Member States publish flows data with breakdowns available for nationality *and* previous residence, data from the ONS International Passenger Survey (IPS) is here used to illustrate the patterns for individual Member States. As this is less precise than Eurostat data (estimating outflows of 96 000 in 2019, significantly lower than the 140 000 estimated by Eurostat surveys), it should be interpreted with some caution. Figure 72 shows the outflows of mobile EU citizens from the UK to their Member State of citizenship for 2011 and 2016-2019, focusing on the main nationalities of movers previously resident in the UK.

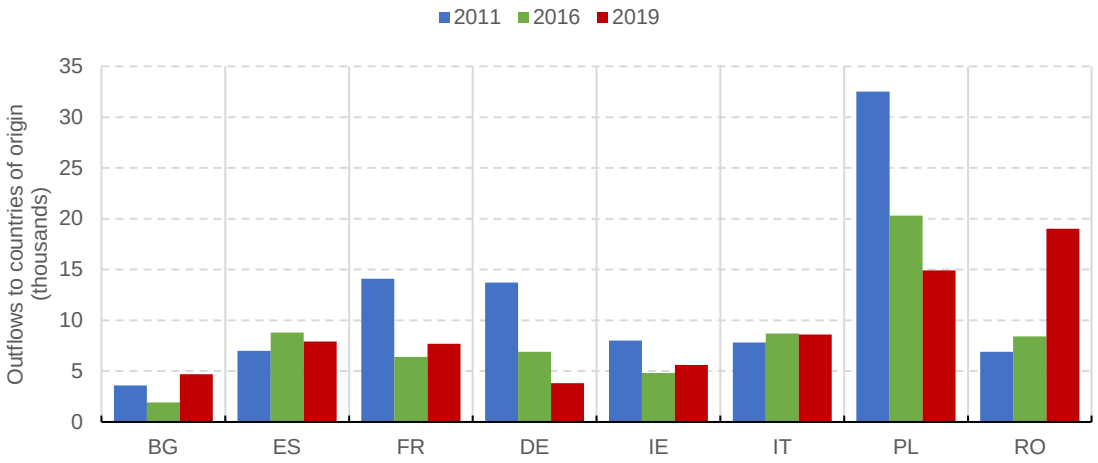
[190] The details of these changes, as well as why they are necessary, are discussed in **Annex A.4**.

Table 32: Flows of EU movers aged 20-64 in the UK, 2011 and 2016-2019

	2011	2016	2017	2018	2019	Trend
Flows of working-age EU-28 movers to the UK (thousands)						
Inflows	139	212	194	167	145	
Outflows	84	109	133	113	141	
Net flows	55	104	61	55	4	
Change compared to previous reference year (%)						
Inflows		53	-8	-14	-14	
Outflows		29	23	-15	25	
Net flows		89	-41	-11	-93	

Source: Eurostat, international migration [migr_emi1ctz; migr_imm1ctz], Milieu calculations.

Figure 72: Outflows of EU movers from the UK to their country of citizenship for key sending countries, 2011, 2016 and 2019



Source: ONS (2020) 'International Passenger Survey 4.03, country of birth by country of last or next residence', Milieu calculations.

From this data, there is no universal 'Brexit effect' in terms of return mobility from the UK, although patterns appear to be present for specific countries. The most notable differences over time are the decrease in returnees to Poland (from 32 500 in 2011 to 15 000 in 2019)[191], and an increase in returnees to Romania (from 6 900 in 2011 to 19 000 in 2019). Other Member States give a mixed picture, with some increases and decreases, and some holding relatively steady since 2016.

Another way to consider how Brexit may have changed mobility patterns in the EU is to focus on national groups of movers for which the UK is a key country of destination. Three Member States had 50 % or more of their movers living in the UK in 2019: Ireland (in 2019 82 %, or 182 000 movers), Lithuania (54 % or 128 000) and Latvia (51 % or 69 000). While the absolute numbers may be comparatively small, a large return of movers previously resident in the UK could have an important effect for Member States with smaller populations; this has been noted by e.g. Statistics Lithuania, where returns from the UK

[191] It is not entirely clear wherein this 2012 decrease lies. Return mobility to Poland remains relatively steady (and declining) since 2009, and the decrease shown in IPS data does not occur in e.g. Anacka, M., and Wójcicka, A. (2019) 'Impacts of Return Migration in Poland', *Reminder Project Working Paper*, Warsaw: University of Warsaw. Given the break in trend, it is possible that the difference is due to imprecise IPS data. The observation of return mobility from Poland to the UK being lower both at the time of and three years after the Brexit referendum, than in 2009, nevertheless holds.

increased from 6 300 in 2016 to 9 600 in 2019, and made up 46.2 % of returnees to Lithuania in 2019[192]. For Ireland the 5 600 inflows from the UK made up 35 % of returns, and in Latvia 2 700 returnees from the UK accounted for 83 % of the total[193].

In total, the available data suggest that outflows of EU citizens from the UK indeed have increased since 2016 while inflows have decreased. The magnitude of this change varies significantly between Member States though, with some recording significant increases of inflows since the referendum (Italy, Spain and Romania) and others seeing decreases in flows (most notably Poland, while in France levels remain substantially similar to 2012).

[192] Statistics Lithuania (2021), 'International migration of the Lithuanian population', accessed 28 July 2021, Fig. 2.
[193] Similar national statistical sources are not available for Ireland and Latvia. These estimates are therefore instead based on UK IPS data compared with Eurostat data on inflows.

4.4. Potential explanations for trends in return mobility

4.4.1. Macro-economic factors

In addition to personal factors, movers are also influenced by the economic situation of the country where they reside – a poor economic situation in the country of residence, or the prospect of higher earnings elsewhere, can work either as a push or pull factor. To illustrate how such macroeconomic factors work in relation to returnees specifically, the development of GDP per capita, employment and unemployment rates, and median incomes for employed people expressed in purchasing power standards (PPS)[194] are considered for our large sending countries: Spain, Italy, Poland and Romania. The analysis also considers the development in significant countries of residence for movers from these Member States.

For a first comparative overview**,** Table 30 earlier in this chapter shows the return levels to the four Member States for 2011-2019. Spain and Italy both have steady increases in the 2011-2019 period. Romanian returns have also increased though with some fluctuation. Polish returns, finally, are the only ones to decrease.

Table 33 further shows the macroeconomic indicators for the four countries in 2009, 2016 and 2019. In 2019 all four Member States have increased their GDP per capita and median incomes compared to both 2009 and 2016. With the exception of Italy (where unemployment rates are 2.2 pps higher in 2019 than in 2009), all also have higher employment and lower unemployment rates. At first glance, this signifies an improved economic situation with less incentive for nationals to move abroad (and more incentive for movers to return). More insights can, however, be gained by studying the situation in the four Member States individually.

Table 33: Macroeconomic indicators for four significant sending countries, and differences over time

	2009	2016	2019	Δ2009-2019	Δ2016-2019
GDP per capita (EUR)					
ES	23 100	23 760*	25 200*	+9 %	+6 %
IT	26 600	26 240	27 180*	+2 %	+4 %
PL	9 070	11 240	13 020	+44 %	+16 %
RO	6 410	7 670	9 110*	+42 %	+19 %
Employment rate					
ES	64.0 %	63.9 %	68.0 %	+4.0 pps	+4.1 pps
IT	61.6 %	61.6 %	63.5 %	+1.9 pps	+1.9 pps
PL	64.9 %	69.3 % (b)	73.0 %	+8.1 pps	+3.7 pps
RO	63.5 %	66.3 % (b)	70.9 %	+7.4 pps	+4.6 pps
Unemployment rate					
ES	17.9 %	19.6 %	14.1 %	-3.8 pps	-5.5 pps
IT	7.8 %	11.7 %	10.0 %	+2.2 pps	-1.7 pps
PL	8.2 %	6.2 % (b)	3.3 %	-4.9 pps	-2.9 pps
RO	6.9 %	5.9 % (b)	3.9 %	-3.0 pps	-2.0 pps

[194] Median equivalised incomes of employed persons are expressed in PPS to reflect local living costs, thereby enabling a comparison of how low or high the salary is compared to other Member States in Europe.

	2009	2016	2019	Δ2009-2019	Δ2016-2019
Median equivalised income of employed persons (16-64 years) in PPS					
ES	18 425	18 630	18 960	+3 %	+8 %
IT	18 396	19 420	20 105	+9 %	+9 %
PL	8 631	12 529	14 216	+65 %	+25 %
RO	4 001	5 607	9 122	+128 %	+81 %
Outflow of nationals					
ES	24	65	56	139 %	-13 %
IT	37	86	94	153 %	9 %
PL	140	141	102	-27 %	-28 %
RO	195	169	159	-18 %	-6 %
Inflow of nationals (returnees)					
ES	16	38	53	227 %	40 %
IT	23	25	46	101 %	84 %
PL	126	69	50	-61 %	-28 %
RO	104	100	136	30 %	36 %

Note: * indicates provisional values; (b) indicates break in time series compared to previous number.

Source: Eurostat, Real GDP per capita [SDG_08_10]; employment rate by sex, age group 20-64 [T2020_10]; total unemployment rate, ages 15-74 [TPS00203]; and mean and median income by most frequent activity status [ILC_DI05], Milieu calculations.

Spain

Spain experienced moderate increases in all four economic indicators, reflecting the economic recovery that has occurred since the 2008-2009 recession[195]. Probably reflecting this, returns increased steadily in 2013-2017, before levelling out at a higher level in 2018-2019. Outflows of nationals are also 13 % lower in 2019 at 56 000, down from 65 000 in 2016. The Spanish case therefore appears a good example of how an improved economic situation can increase returns by motivating movers to return – or at least remove economic obstacles to their return through increased salaries and more employment opportunities. The most marked increase in returns since 2016, although from a moderate level, concerns returns from the UK, which increased from 2 389 in 2016 to 3 324 in 2019 (+935 or +39 %), possibly also motivated by Brexit.

Italy

Italy also experienced economic improvement, but to the weakest degree of the four Member States; the employment rate increased by only 1.9 pps compared to 2009, and likewise by 1.9 pps compared to 2016 (reflecting a decrease in employment levels for 2010-2015 which Italy recovered from in 2016). Furthermore, while the unemployment rate of 10 % is lower than in 2016 (11.7 %), it is higher than in 2009 (7.8 %). Perhaps reflecting the lack of improvements in the labour market (as well as existing economic inequalities between the North and South, which have been exacerbated during and following the 2008-

[195] Gonzáles-Ferrer, A., and Moreno-Fuentes, F. (2017), 'Back to the Suitcase? Emigration during the Great Recession in Spain?', *South European Society and Politics*, vol. 22, no. 4, pp. 447-471.

2009 economic crisis[196]), Italy is also the only country whose outflows of nationals increased compared with 2016.

This may also be an explanation for the increased levels of returns, despite an underwhelming economic performance: outflows of Italians have increased every year since 2010, from 34 700 in 2010 to 93 831 in 2019. While returns are lower, they have increased every year since 2013, from 17 400 in 2013 to 46 100 in 2019. As discussed earlier in the chapter, many movers return within five years of leaving – with this in mind, it appears likely that the increased returns are an effect of likewise increased outflows in the recent past.

Poland

Poland stands out as being the only country of the four where inflows of nationals have decreased since 2016, down 28 % from 69 000 to 50 000. Over the same time period, outflows have also decreased more than elsewhere. The economic development since 2009 appears to explain these developments and may indicate that Poland's status as a significant sending country is decreasing. GDP per capita has increased by 42 % since 2009 and 16 % since 2016, reflecting continued growth; incomes meanwhile increased by 65 % since 2009, and 25 % since 2016. The decrease in outflows over the past few years also contributes to the decrease in returnees; as discussed earlier in the chapter, many movers return within five years of moving[197]. Furthermore, some long-standing communities of Polish abroad (e.g. in the UK) have become socio-culturally integrated in the host country over time, and are thereby less likely to return despite the economic improvements in the home country[198].

Romania

Romania, finally, has the highest absolute levels of returnees. Although the level has fluctuated since 2009, there is an overall increase of 30 %. The macroeconomic indicators appear to support the notion that economic development increases returns: although from a lower level than the other countries, Romania's GDP per capita and median income has increased significantly. Most notably, median incomes in PPS increased by +128 % since 2009 and by +81 % since 2019; the labour market likewise sees increased employment and decreased unemployment. However, it should also be noted that Romania retains a high level of outflows (up 9 % since 2016), and that many returnees may simply be recent movers. While the economic situation in Romania has significantly improved, earnings remain significantly lower than in popular destination countries (with most Romanian movers found in Germany, Italy and the UK). The consistent high level of returns may therefore be a reflection of the common practice of circular mobility among working age Romanians[199]. Despite the economic development, it may also reflect dissatisfaction with earnings and quality of life relative to the previous country of residence[200], leading to continued high outflows.

196 Odoardi, I., and Muratore, F. (2019) 'The North-South Divergence in Italy During the Great Recession', *The Manchester School*, vol. 87, no. 1, pp. 1-23.

197 Fries-Tersch, et al. (2020), pp. 84-85; Tanay, Sumption, and Aujean (2018).

198 Snel, E., Faber, M., and Engbersen, G. (2015), 'To Stay or Return? Explaining Return Intentions of Central and Eastern European Labour Migrants', *Central and Eastern European Migration Review*, vol. 4, no. 2, pp. 5-24.; Ryan, L. (2018), 'Differentiated embedding: Polish migrants in London negotiating belonging over time', *Journal of Ethnic and Migration Studies*, vol. 44, no. 2, pp. 233-251.

199 Ferri A., and Rainero S. (2010), *Survey of European Union and Return Migration Policies: the case of Romanian migrants*, Mestre: Veneto Lavoro, pp. 21–25; Barcevičius, et al. 2012.

200 See e.g. Beauchemin, C., et al. (2018) 'Comparative Report on the Impacts of Circular and Non-Circular Migration (Argentina, Romania, Senegal, Ukraine)', *TEMPER Project Working Paper*, no. 13.

4.4.2. Situation of returnees after return

Member States have an interest in not only encouraging movers to return, but also to ensure that they find adequate work and that their skills come to full use. The benefits brought by returnees have been covered extensively in literature and include an influx of human and financial capital, skills, and experience[201], and slow down demographic ageing by increasing the working age population and tax base[202]. For returnees, an ideal case may entail where they are able to harness skills and experience gained abroad to gain better employment in their home country; while in the short-term returnees tend to have lower employment rates than non-mobile nationals, successful strategies and measures to get them into suitable employment can benefit both returnees and Member States[203].

The situation faced by returnees in the labour market after their return depends on a range of factors. A core risk are skills mismatches, which lead to returnees taking work for which they are overqualified, and which does not match their expectations in terms of salary, tasks and career development. This has a negative effect both on the returnee, who may choose to remigrate if they do not feel their skills come to the best use, and on the Member State, which is not able to harness the skills to develop their knowledge economy[204].

Skills mismatches can have their roots in both the supply and demand side. If movers have worked in underqualified positions abroad – perhaps as a way of gaining experience, or due to previous skills mismatches – they may lack the skills that businesses require upon their return[205]. They may also struggle to find opportunities from a lack of social and professional networks if they have been away for many years[206].

On the other side of the relationship, some businesses will also lack understanding of the skills and experience that returnees gained while abroad, and as a consequence undervalue them[207]. All this varies regionally and locally, depending on factors such as local labour demand and businesses' previous experience of labour returning from abroad[208]. Structural factors beyond the control of returnees also appear to influence their likelihood of successful integration.

For instance, research in Ireland showed that men in the past experienced a higher economic premium of return than women (earning 10-15 % more than non-movers) in 2000[209]. While in the Irish case this disparity appears to have disappeared by 2010[210], it is likely that similar effects can be found elsewhere in the EU, especially in Member States which already have significant wage disparities between men and women. Another example

[201] Martin and Radu (2012); Zaiceva, A., and Zimmermann, K. (2016), 'Returning Home at Times of Trouble? Return Migration of EU Enlargement Migrants During the Crisis' in Kahanec, M. and Zimmermann, K. (eds.), *Labor Migration, EU Enlargement and the Great Recession*, Berlin: Springer; ESPON (2017), *The Geography of New Employment Dynamics in Europe*, Final Report, 8 March 2018, Luxembourg: ESPON.

[202] Fries-Tersch, Jones and Siöland (2020), Section 4.

[203] Fries-Tersch, Tugran, and Bradley (2017), pp. 107-108.

[204] Todisco, et al. (2003); Garcia Pires, A. (2015) 'Brain drain and brain waste', *Journal of Economic Development*, vol. 40, no. 1.

[205] Kurekova, M., and Zilincikova, Z. (2018) 'What is the value of foreign work experience for young return migrants?', *International Journal of Manpower*, vol. 39, no.1, pp. 71-92.

[206] Apsite-Berina, E., Manea, M.-E., and Berzins, M. (2020), 'The Ambiguity of Return Migration: Prolonged Crisis and Uncertainty in the Life Strategies of Young Romanian and Latvian returnees', *International Migration*, vol. 58, no. 1, pp. 61-75; Constant, A. (2019), 'Return, Circular, and Onward Migration Decisions in a Knowledge Society', *GLO Discussion Paper*, no. 411.

[207] Gittins, T., and Fink, M. (2015), 'Return migration, informal learning, human capital development and SME internationalization in the CEE region: A systematic literature review', *Journal of East European Management Studies*, vol. 20, no. 3, pp. 279-303.

[208] Coniglio and Brzozowski (2016); Kaczmarczyk, P., Anacka, M., and Fihel, A. (2016), 'Migration as an Asset? Polish Returnees at the Time of the Crisis' in Kahanec, M., and Zimmermann, K.F. (eds.) *Labor Migration, EU Enlargement and the Great Recession*, Berlin: Springer, p. 234.

[209] Barrett, A., and O'Connell, P. J. (2000), 'Is there a wage premium for returning Irish migrants?', *IZA Discussion Paper*, no. 135, Bonn: IZA.

[210] Barrett, A., and Goggin, J. (2010). 'Returning to the question of a wage premium for returning migrants'. *IZA Discussion Paper*, no. 4736, Bonn: IZA

of structural forces is that higher-skilled and -educated movers are more likely to successfully reintegrate into the labour market as they are more attractive to employers (especially in occupations which have a lack of qualified labour)[211]. These dynamics can be illustrated by examples from the four focal countries in the previous section.

Poland

Skills mismatches are mainly observed in Poland for older return migrants, females, those living in rural areas, and less wealthy individuals; young migrants, while being effective in finding a job upon return were more likely to face job-related difficulties and general (e.g. psychological or administrative) hardship[212]. Overall, returnees who returned for work reasons, and who already had accumulated human capital (e.g. English skills) and financial reserves prior to their original move were most likely to successfully reintegrate into the labour market[213].

This appears to add up to the phenomenon that returnees overall perform worse in the labour market than non-mobile nationals in terms of employment, and that many report that they end up in employment where they are overqualified relative to their tasks[214]. The risk for the country of origin in this situation is that movers either choose not to return, or that returnees choose to move back to their previous country of residence. This was for instance documented in a survey of ex-hospitality workers returning from the UK indicating that despite a relative ease of finding employment (although generally not in hospitality), the better salaries and living standards in the UK made them consider moving back to their previous residence[215].

Romania

In Romania, low-qualified movers are more likely to return than those with high qualifications[216]. Agricultural workers were 2.6 times more likely to return than those in other sectors, with returns highest to poorer regions (with higher emigration rates, and therefore more need for labourers)[217]. Given the short-term nature of agricultural work, as it is tied to the seasons, it is likely that a significant portion of agricultural returnees are seasonal workers engaged in circular or short-term movement abroad[218]. While Romanian movers often experience higher salaries in other Member States, returns can be spurred on by factors such as lack of support systems in country of residence; xenophobia or discrimination; or the pull of social contacts or familial ties in the home country[219].

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211 Coniglio and Brzozowski (2016); Lados, G. and Hegedűs, G. (2016), 'Returning Home: An Evaluation of Hungarian Return Migration', *Hungarian Geographical Bulletin*, vol. 65, no. 4, pp. 321-330.

212 Coniglio and Brzozowski (2018).

213 Karolak, M. (2020), 'Returning for (Dis)Integration in the Labour Market? The Careers of Labour Migrants Returning to Poland from the United Kingdom' in Hinger, S., and Schweitzer, R. (eds.) *Politics of (Dis)Integration*, Cham: Springer, pp. 101-120.

214 Anacka, and Wójcicka (2019) 'Impacts of Return Migration in Poland', *Reminder Project Working Paper*, Warsaw: University of Warsaw.

215 Filimonau, V., and Mika, M. (2019), 'Return labour migration: an exploratory study of Polish migrant workers from the UK hospitality industry', *Current Issues in Tourism*, vol. 22, no. 3, pp. 357-378.

216 Barcevičius, et al. (2012).

217 Stănculescu, M.S., and Stoiciu, V. (2012), '*Impactul crizei economice asupra migraţiei forţei de muncă din România*' (The impact of the economic crisis on labour force migration in Romania), Bucharest: Paideia, p. 71, as cited in Angel, R., and Cosciug, A. (2018) 'Patterns and Mechanisms of Return Migration to Romania', in Hornstein Tomic, C., Pichler, R. and Scholl-Schneider, S. (eds.) *Remigration to post-socialist Europe: Hopes and realities of return*, Vienna: Lit-Verlag, p. 11.

218 Fries-Tersch, Siöland and Jones (2021).

219 Bermudez, A., and Paraschivescu, C. (2020), 'Diverse Ways of Thinking and Performing Return Migration: Colombians and Romanians in Europe', *International Migration*, vol. 59, no. 3, pp. 177-191.

As in Poland, interviews indicated that nostalgic feelings towards the home country may encourage returns; however, the same goes for similar feelings towards the previous country of residence after returning, which means that returns may be temporary if expectations are not met[220]. There is strong evidence of Romanian movers engaging in circular or onward movement: in the aftermath of the Great Recession, many Romanians, for example those previously resident in Italy moved to other Member States less affected by the crisis, rather than return to Romania[221]. The possibility of onward movement, rather than returning, was also raised as a response to Brexit and the associated uncertainty[222]. In terms of retaining returnees and encouraging more to return, it is important to note that increased salaries are not sufficient in isolation – overall life quality and working conditions also matter[223].

Italy and Spain

There is less literature available on Italian and Spanish returnees and their reintegration than for Poland and Romania, and some dynamics of the two countries are similar; Italy and Spain are therefore considered together here. National data for the two countries allows for the identification of the most common previous countries of residence of returnees. In Italy, the largest groups of returnees in 2019 arrived from Germany (3 330 or 22 % of the total), Romania (3 184 or 21 %) and the UK (3 057 or 20 %)[224]. Total returns to Italy increased by 5 544 since 2009, an increase of 56 %, and the majority of this increase was made up by increased flows from Romania and the UK[225].

In the Spanish case, a marked increase is observed in returns since the 2008-2009 Great Recession, where Spain was hard hit and experienced both decreased inward mobility and increased outflows of both nationals and other movers[226]. Since 2009, inflows of nationals have increased by +227 % from 16 000, to 53 000 in 2019[227], reflecting the Spanish economic recovery and reflecting an overall increase in inflows over the past few years. As in Italy, the most marked increase in returns since 2009 are from the UK, from 1 164 in 2009 to 3 324 in 2019 (+2 160, making up +47 % of the total increase in returns to Spain). Returns from the UK have increased since 2014, and at a higher rate since 2016 (from 11 385 to 18 300 in 2019). This likely reflects a combination of the uncertainties around Brexit and the continued status of EU movers, on the one hand, and economic improvement in Spain on the other.

Some of the barriers discussed in the Polish and Romanian labour markets appear to be present for Italy and Spain, too. A qualitative study of high-skilled, young Italian movers in Paris cites an inflexible and unmeritocratic Italian labour market, and overall lack of

[220] Gherghina, S., Plopenau A.P., and Necula, C.V. (2020), 'The impact of socio-cultural integration on return intentions: evidence from a survey on Romanian migrants', *Journal of Immigrant and Refugee Studies*, vol. 18, no. 4 pp. 1–14.

[221] Ferri A., and Rainero S. (2010), pp. 21–25; Barcevičius, et al. 2012.

[222] Petrache, A. (2019), 'Making the most of the EU internal mobility – Romanian citizens' migration to the UK in the context of Brexit, a race against time', *EUROPOLITY*, vol. 13, no. 2, pp. 215-240.

[223] Docquier, F., Peri, G., and Ruyssen, I. (2014), 'The Cross-Country Determinants of Potential and Actual Migration', *International Migration Review*, vol. 48, no. S1, pp. S37-S99; Boncea, I. (2015), 'Turning Brain Drain into Brain Gain: Evidence from Romania's Medical Sector', *Procedia Economics and Finance*, vol. 20, pp. 80-87.

[224] Istat (2021) 'Migration (Transfer of residence): Immigrants – country of origin', accessed 20 July 2021. All cited statistics for Italy are from the same dataset. Note that this may also include short-term returnees.

[225] Since 2009, returns from UK and Romania to Italy have increased with a collective 3 847 since 2009, making up 70 % of the total 5 544 increase in returnees. In the same time period, returns from Germany have decreased significantly, from 4 240 in 2009 to 3 330 in 2019.

[226] Gonzáles-Ferrer and Moreno-Fuentes (2017).

[227] Instituto Nacional de Estadística (INE) (2021), 'Immigration flow from abroad by semester, sex, age group, country of origin, nationality (Spanish/foreign) and country of birth with respect to the country of origin', accessed 20 July 2021. All cited statistics for Spain are from the same dataset. Note that this may also include short-term returnees. Note that the data has been filtered to only account for Spanish citizens who were also born in Spain.

opportunity, as reasons for remaining abroad[228]. Similarly, qualitative studies which interviewed young Spanish movers found that reticence to return was often connected with a disillusionment with the political and economic system[229]. While Spain is seeing some economic recovery, many of those younger workers that left during the economic crisis did so in an environment of public savings through decreasing wages, which in turn decreases their faith in the possibility of career success upon return to Spain[230].

One regional study which surveyed returns of postgraduate degree holders to the region of Sardinia, reinforced the importance of social networks and perceived life quality gains for returnees – comparing the movers within and outside of Italy, it found that those who went abroad were more likely to return to Sardinia. Professional reasons were listed as the most common reason for non-return, while family and sentimental ties are the most important return motivations[231]. Together with movers' concerns about the labour market, this emphasises the value of (real or perceived) increases in life quality for returnees when making the decision on whether to stay abroad or return.

4.4.3. Other potential factors influencing returns

As this may often have been the reason for mobile EU citizens moving abroad in the first place, economic reasons may not be an immediate reason for returning to the country of citizenship. However, it is possible that the earnings from working abroad *enables* a return to the home Member State due to savings or increased experience which may be an advantage in seeking new work in the home Member State, even if salaries there would be comparatively smaller than in the previous Member State of residence[232]. The level of 'required' savings or resources to return will vary depending on movers' preferences. If a mover already from the outset intends to return in the foreseeable future, he/she may be more willing to accept a low-paying or entry-level job if that reduces search costs and as long as the pay is sufficiently above the income in the country of origin. Long-term movers on the contrary will be more likely to have a higher wage development in the country of residence[233].

One reason that lower comparative incomes may not deter movers from returning is if there are perceived life satisfaction gains – in short, whether mobile EU citizens expect that their life satisfaction will increase or decrease if they were to return to their country of origin. A study using data from the German Socioeconomic Panel and the World Value Survey estimated that differences in life satisfaction could explain between 38 % and 47 % of variation in return intentions, depending on the methodology[234].

It also indicates that an improvement of the economic situation in a country may not, on its own, motivate return mobility: a perceived increase in the overall quality of life in the country

[228] Dubucs, H., Pfirsch, T., and Schmoll, C. (2016), '*Talking about my Generation*: Emigration and a "Sense of Generation" among Highly Skilled Young Italians in Paris' in Murray, L., and Robertson, S. (eds.) *Intergenerational Mobilities: Relationality, Age and Lifecourse*, London: Routledge, pp. 78-90.

[229] E.g. Bygnes, S., and Bivand Erdal, M. (2017), 'Liquid migration, grounded lives: Considerations about future mobility and settlement among Polish and Spanish migrants in Norway', *Journal of Ethnic and Migration Studies*, vol. 43, no. 1, pp. 102-118; Jendrissek, D. (2016), 'Building a Future in Times of Crisis: Young, Highly Qualified Migrants in the UK', *Journal of Contemporary European Studies*, vol. 24, no. 3, pp. 323-340.

[230] Domínguez-Mujica, J., and Díaz-Hernández, R. (2019), 'The Dilemma of Returning: the Liquid Migration of Skilled Spaniards 8 years down the Economic Crisis', *Canadian Studies in Population*, vol. 46, pp. 99-119.

[231] Crescenzi, R., Holman, N., and Orru´, E. (2017), 'Why do they return? Beyond the economic drivers of graduate return migration', *The Annals of Regional Science*, vol. 58, no. 3, pp. 603-627.

[232] Zaiceva and Zimmermann (2016).

[233] Adda, J., Dustmann, C., and Görlach, J.-S. (2021) 'The Dynamics of Return Migration, Human Capital Accumulation, and Wage Assimilation', CESifo Working Papers, no. 9051.

[234] Schiele, M. (2021), 'Life satisfaction and return migration: analysing the role of life satisfaction for migrant return intentions in Germany', *Journal of Ethnic and Migration Studies*, vol. 47, no. 1, pp. 110-129. While this study also included individuals from third countries, there is little reason to believe that its findings would have been substantially different if limited to EU movers only.

is also important[235]. The determinants of life quality are difficult to quantify but can for instance include the quality and availability of services, satisfaction with the country's governance, or availability of cultural or social events. While the study was not limited to EU citizens, similar dynamics would be expected to influence whether a mover returns to their home Member State.

Being near family or other contacts in the home Member State itself can be seen as an increase in life quality. In an investigation of return mobility of EU-13 movers in the wake of the Great Recession, social and familial networks were identified as important motivators for return, while professional reasons were the most important motivator in *not* returning[236]. This can be due to substantially better professional opportunities abroad, or concerns of skills mismatching. Movers who have an initial high preference for the host country vis-à-vis their home country – whether for personal, economic or professional reasons – are also more likely to remain in the longer term[237].

As language skills are an important predictor of successful integration in Member States of residence and in the formation of social networks there[238], this may also indicate that returns are slightly less likely in cases where the language of the Member State of residence is commonly taught (e.g. in the case of English and the UK or Ireland), or where the language is similar to that of the country of residence (as in the case of the Romance languages. However, given the importance of factors such as possible life satisfaction improvement and social networks in the home country, it is unlikely to in itself deter mobile EU citizens from returning to their home countries.

Finally, while the factors discussed above generally concern voluntary returns, there are also external factors which may motivate – or force – mobile EU citizens to return to their home countries. One such circumstance is economic crises or downturns, or other events in which the employment or earnings of mobile EU citizens are threatened, and they must return to their country of origin for financial reasons. While a 2012 Eurofound study did not find a mass return during the Great Recession, it did find that the crisis accelerated foreseen or planned returns[239]. A separate study of Romanian and Latvian youths reaffirmed the importance of social support network in moving decisions[240]. Other crises can come in the form of health crises such as the COVID-19 pandemic, the consequences of which are discussed in Section 3.

Other external circumstances are political changes in their country of residence which change the circumstances for movers. Brexit is the most recent such political change, and while it is too early to tell how it will affect mobility flows in the long term (and to disentangle its effects from those of the COVID-19 pandemic and associated travel restrictions), the more restrictive border regime that has been proposed would deprive many EU citizens of the ability to move to the UK for work reasons. It may also impose additional regulations on mobile EU citizens still resident there or simply make them feel less welcome[241], with the consequence that they may decide to either return to their country of origin or move to another Member State[242].

[235] Docquier, Peri, and Ruyssen (2014).
[236] Zaiceva & Zimmerman (2016).
[237] Adda, Dustmann, and Görlach (2021).
[238] See for example Gazzola, M. and Mazzacani, D. (2019), 'Foreign language skills and employment status of European natives: evidence from Germany, Italy and Spain', *Empirica*, vol. 46, pp. 713-740; and Gilmartin, M., and Migge, B. (2015) 'European migrants in Ireland: Pathways to integration', *European Urban and Regional Studies*, vol. 22, no. 3, pp. 285-299.
[239] Barcevičius, E., et al. (2012).
[240] Apsite-Berina, Manea, and Berzins (2020).
[241] Portes, J. (2016), 'Immigration after Brexit', *National Institute Economic Review*, vol. 238, no. 1, pp. R13-R21.
[242] Sredanovic, D. (2020).

4.5. Return mobility programmes

Some Member States have set up return programmes, which is understood here as a programme with the explicit task to encourage mobile citizens who reside abroad, to return to the country. The emphasis of the programmes also varies between Member States, with some actively seeking to attract back workers, and others seeking more broadly to help with the reintegration of those that choose to return.

Assistance can come in the form of e.g. custom advisory services which help prospective returnees navigate the practicalities of returning; workshops or networking opportunities to help them reintegrate in the labour market; or even coaching to assist them in setting up businesses. Return assistance can be an important part of preventing skills mismatches by providing support to returnees – especially those in vulnerable populations, or those who face structural barriers (young, old, female, and/or poor)[243].

In order to obtain an overview of such programmes, the public employment services of EU Member States were contacted through the EURES network with a questionnaire asking about return programmes. This was complemented with desk research[244]. The results are shown in Table 34.

As observed, returnees face more barriers than the purely economic. To address this obstacle, there are some initiatives which encourage returns by providing assistance with social or employment reintegration after arrival, including through personalised coaching or workshops. Such initiatives are found in e.g. Ireland, Estonia and Spain. The assistance can also be offered prior to returning through digital means: the Polish public employment service and German Bundesagentur für Arbeit have both offered such sessions to guide prospective returnees through the rules that apply to them and offer advice on reintegration into the labour market.

Incentives and assistance may also be sector-specific, based on the needs of certain parts of the economy. In Ireland, the 2009-2015 hiring freeze in the public sector, following the Great Recession, led to a significant lack of nurses as many new graduates moved abroad for work. A specific nursing recruitment campaign was therefore in place in 2015-2019, offering returning nurses assistance with relocation packages and with the first year of their nursing registration fees. However, the scheme only resulted in the recruitment of 120 nurses during its time span, with incentives seen as insufficient[245]. Schemes to recruit academics and researchers have been more successful in at least two cases, with both Slovakia and Poland having programmes which offered scientists abroad assistance with relocation, the cost of moving, and access to additional research funding. Evaluations of these programmes indicate that they have been of benefit to the universities in forming international partnerships.

Return mobility may require significant investments on behalf of the returnees in the form of e.g. moving and travel costs, and economic assistance can also be offered to non-entrepreneurs. A number of programmes are in place to offer assistance with relocation costs on a means-tested basis, as it is done through the 1995 Latvian Repatriation Law or the Portuguese Programma Regresar, both of which aim to encourage returns of citizens regardless of economic status. Incentives can also come in the form of tax incentives, such as through the Italian 'counter-exodus law', which offered significant tax discounts for

[243] Coniglio and Brzozowski (2018).
[244] A significant source in this work was MacÉinrí, P., and McGarry, O. (2017) 'Overview of relevant EU and national initiatives and policies that influence youth mobility, both directly and indirectly', YMOBILITY Project Deliverable 8.1, Cork: UCC, pp. 48-52.
[245] Hutton, B. (2019) 'Campaign to attract Irish nurses home has been "stood down"', *The Irish Times*, 1 July 2019.

university-educated returnees between 2011 and 2015 (and since 2016, similar but lower incentives for all returnees, subject to employment).

Financial tools also come in the form of hiring incentives to companies, usually through tax breaks, if they either recruit diaspora members or recent returnees. Used for instance in the 'Rebrain Greece' programme and the talent-return programme of the Spanish province of Andalusia (in place since 2012), these allow the government to shift incentives towards private institutions who can use their own networks and resources to reach potential recruits. No estimations are currently available on how many returnees or companies have availed themselves of these opportunities.

Finally, there is the category of programmes encouraging entrepreneurship, e.g. through business grants, coaching or beneficial business rates. These target diaspora members and encourage them to start businesses in the country of origin. Two such programmes were the Smart-up Diaspora which accepted applications in Romania from 2017-2018, and the 'Become your own boss' (*Zostań w Polsce - swoim szefem*) which ran in the Polish capital municipality of Warsaw in 2010-2012. A similar scheme in the Italian region of Umbria offered coaching and grants of up to EUR 20 000 for Umbrian returnees who had spent at least 2 years abroad. The total number of returnees from these programmes are limited. The two programmes led to the creation of 48 new businesses in Romania, 23 in Warsaw (out of 31 applicants) and 17 in Umbria.

Table 34: Selection and categorisation of EU Member State return programmes

Type of return program	Examples	Comments
Integration help (Recruitment/job-finding assistance, social reintegration)	'Your return to Germany': Online workshop (DE)	Online workshop offered to German prospective returnees to offer targeted advice on reintegration into the labour market and on local regulations.
	Plan de Retorno a España (ES)	Guidance and assistance with finding work and navigating Spanish work market.
	Crosscare Migrant Project (IE)	Government-funded NGO in Ireland which supports returnees with social activities and help to reintegrate.
	Have you got a PLan to return? (PL)	Interactive platform provided by the Polish public employment service to help guide prospective returnees through regulations, as well as indicate the possible social benefits of returning to Poland.
	Pomorskie! I'm coming back here, I'm working here (PL)	Run by the Regional Labour Office of Gdansk, this scheme is aimed at Polish citizens residing abroad who are either aged 30-49, unemployed disabled or have low qualifications. It offers coaching and job training for those who settle in the Pomorskie Voivodeship, and has recruited 32 people since its start in 2019.
	Programa Regresar (PT)	Transversal programme which includes personalised coaching and advice services, economic incentives and entrepreneurship help, and assistance with the practical aspects of returning. Estimated to have benefited 2 234 individuals since 2019.
	Integration Foundation (EE)	Offers coaching and opportunities for social and professional networking for recent returnees, as well as economic assistance for those in need.
Targeted and sector-specific incentives	Nursing in Ireland recruitment campaign (IE)	Included monetary relocation cost support up to EUR 1 500, and an allowance covering the first year of Nursing Registration Costs (up to EUR 450) to encourage the return of expatriate nurses. Discontinued due to limited impact, only recruiting 120 nurses in 2015-2019.
	Polish Returns (PL)	Targeting Polish scientists and academics abroad,

Type of return program	Examples	Comments
		encouraging them to take up positions at Polish universities. Incentives include increased remuneration for both the researcher and their project group, payment of relocation costs, and additional available research funding.
	Support Scheme for the Return of Experts from Abroad (SK)	Offered coaching and job matching to highly qualified Slovak graduates abroad, plus additional grants to facilitate move. Led to the recruitment of 10 junior researchers and 16 experts, with evaluations indicating an additive benefit universities in the form of additional funding and exchanges.
Tax incentives to companies and individual returnees	1995 Repatriation Law (LV)	Assistance with relocation costs and additional unemployment benefit available for up to 6 months of first year in LV.
	Fiscal Support Measure within the Programma Regresar (PT)	Depending on when the worker left PT, may lead to up to five years of 50 % of work income being exempt from taxation.
	Laws 238/2010 (the 'Counter-exodus law') and 58/2019 (IT)	Law 238/2010 offered tax incentives to returnees with a university degree, amounting to a reduction in income tax of 70-80 %. In place from 2011 to 2015; since then it entails a 30 % reduction for all returnees, subject to employment. Law 58/2019 expanded the tax breaks to other categories of workers, with additional benefits to those moving to poorer regions of Italy.
	National Mobility Package (RO)	Monetary incentives for people relocating to rural municipalities with low socioeconomic development.
	Rebrain Greece (EL)	Incentives for businesses to hire high-skilled Greeks from abroad.
	Talent-Return Program (ES)	Andalusian programme offering recruitment incentives for companies through tax allowances. Also offered relocation cost assistance to jobseekers.
Entrepreneurship encouragement	Brain Back Umbria (IT)	The Italian region of Umbria conducted a survey of Umbrians residing abroad. Those who filled in the survey and who had been abroad for at least 2 years were invited to submit business ideas which could receive grants of up to EUR 20 000, leading to the founding of 17 start-up businesses.
	Zostań w Polsce - swoim szefem (Become your own boss) (PL)	Entrepreneurship programme in the municipality of Warsaw, offering mentorship and financing opportunities. Led to creation of 23 new businesses.
	Smart-up Diaspora (RO)	Entrepreneurship programme offering training, mentorship and the opportunity of funding for returnees. Led to creation of 48 new businesses in its time span.

Source: Questionnaire responses from the EURES contact points of EU Member States.

The effectiveness of return mobility programmes will depend on the national circumstances and aims of specific programmes, requiring separate evaluation on a Member State level. There are indications that return programmes and incentives on their own may not be effective in attracting returnees, as other matters such as wage levels, career prospects and overall life quality also matter strongly in the decision to return[246]. This point was also made by a number of the EURES contact points in the return mobility questionnaires.

[246] Barcevičius, et al. (2012), p. 49; MacÉnrei and McGarry (2017). pp. 50-51; responses to EURES questionnaire from national PES.

While programmes on their own are not sufficient to drastically increase return mobility, they can work in conjunction with other factors – for instance targeting those who are already considering returning. Returns may also be indirectly encouraged, e.g. by providing incentives to businesses to recruit from abroad – this provides more economic security for potential returnees, and may go some way to address issues of skills mismatches[247].

Based on the available evidence, return schemes appear to be more effective when they respond to a personal need of a potential returnee, e.g. in the form of targeted measures such as workshops, coaching sessions or personalised guidance from public employment services or civil society organisations. The success of business start-up schemes can meanwhile be measured clearly in the number of created companies, but the numbers are generally low and will be attractive mainly to those who are of an entrepreneurial mindset, or who already had a business idea. Schemes which may focus on specific sectors of the economy will generally only be successful if broader socioeconomic factors such as wages and working conditions also work to make a return attractive.

Overall, factors such as salaries, career prospects and overall living standards appear a stronger driver of return mobility than targeted programmes. However, efforts to better facilitate the transition from mover abroad to returnee at home – and offer targeted assistance to those who for one reason or the other struggle in this transition – can meet some of their concerns, and act as an attractor of potential returnees.

[247] ESPON (2017), pp. 59-65.

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ANNEX A – Methodological notes

A.1. Definitions and measurement

When measuring labour mobility for the purposes of supporting policy-making, it is important that what is captured empirically relates to what is defined by the legislation. The box below explains the groups covered and defined by the EU legislation on free movement, and their measurement in this report.

Box 1: Legal and statistical definitions of mobile citizens

Legal concepts and definitions	Statistical concept and definition
Free movement of citizens	EU movers
EU citizens and their family members have the right to move and reside freely within the territory of the Member States. However, the right of residence for more than three months is only granted to EU citizens and their family members if they are workers or self-employed in the host Member State; inactive EU citizens have the right to reside in another Member State for more than three months if they have sufficient resources for themselves and their family members not to become a burden on the host Member State, if they are enrolled at a private or public establishment and if they have comprehensive sickness insurance cover[248].	EU movers are defined as EU citizens who have their usual residence in a Member State other than their country of citizenship *(stock)*, or who moved their usual residence to a Member State other than their country of citizenship in a given period of time *(flow).* Unless otherwise specified it concerns EU-27 citizens. The concept of 'usual residence' is reflected similarly in Eurostat population statistics and the EU-LFS. All three sources refer to the usually resident population as those persons who have resided, or intend to reside, in a country for at least 12 months[249]. The report focuses on EU movers who were also born outside their current country of residence. However, this distinction is only possible for figures based on EU-LFS. When referring to population and migration statistics, all persons which do not have the citizenship of the respective Member State are looked at.
Workers and jobseekers enjoying the right to free movement	Active EU movers
The notion of worker is only defined through case law – based on this, it can be considered that '(mobile) workers' are EU citizens who are in an employment relationship, and who carry out real and genuine activities which are not purely marginal and ancillary, in a Member State other than their state of citizenship[250]. While legislation speaks in some instances of migrants or 'EU-migrants' this report uses the concept of mobile worker/ mover, to distinguish between EU citizens using their right to free	The legal concepts of mobile workers and jobseekers are approximated by looking at 'active EU movers'. These include EU-28 citizens who are employed or unemployed in an EU Member State other than their country of citizenship (and were born outside that country, see above). The main data source for looking at this group is the EU-LFS. According to EU-LFS methodology, the group of 'employed' includes persons who did any work (one hour or more) for pay or profit during the reference week, sand

[248] Art. 7 of Council Directive 2004/38/EC on the right of citizens of the Union and their family members to move and reside freely within the territory of the Member States.

[249] Eurostat, Metadata on population statistics, point 3.4; Eurostat, Metadata on International Migration Statistics, point 3.4; Eurostat, EU Labour Force Survey Explanatory Notes (from 2014Q1 onwards), p.4.

[250] Directive EC 2004/38 and CJEU case law, source: Verschueren, H. (2015) 'Free movement of workers: the role of Directive 2014/54/EU in tackling current and future challenges', presentation at an Equinet conference, p. 6.

Legal concepts and definitions	Statistical concept and definition
movement and third country nationals which are considered as migrants. Furthermore, EU legislation stipulates that for the purposes of the right of residence in another EU Member State of more than three months, Union citizens who are no longer employed or self-employed can retain their status as workers under certain conditions, or move to the status of jobseekers[251]. EU citizens have the right to move to another Member State in order to look for work and to receive the same assistance from national employment offices; they have the right to reside in another Member State with the status of 'jobseeker' as long as they continue to seek employment and have a genuine chance of being engaged[252].	those who had a job or business but were temporarily absent. The group of 'unemployed' includes those who were not working during the reference week, but who had found a job starting within three months, or who are actively seeking employment and are available to work[253].
Frontier workers, seasonal workers	**Cross-border workers**
Frontier workers are defined as cross-border workers who return to their country of residence 'as a rule daily or at least once a week'[254]. This definition stems from Regulation (EC) No 883/2004 which assigns specific rights to social security to such workers and their family members. Directive 2014/36/EU concerning seasonal workers from third countries defines these workers as migrants who come to work in a Member State for a limited duration. Intra-EU seasonal workers benefit from the right to free movement and equal treatment like any other EU worker.	The EU-LFS explicitly asks for respondents' 'country of place of work' which may be different to the country of residence and which allows for cross-border workers to be identified. However, the survey does not ask for the frequency of commute nor of the underlying employment relationship. Cross-border workers therefore include frontier workers as well as longer-term posted workers and seasonal workers. Given the small number of longer postings and the likely underrepresentation of posted as well as of seasonal workers in a sample-survey like the LFS, these figures are, however, not very reliable.

A.2. Main data sources: EU Labour Force Survey (EU-LFS) and Eurostat population statistics

EU Labour Force Survey (EU-LFS)

The EU-LFS is a large household sample survey providing quarterly and annual results on labour participation of people aged 15 and above. The EU-LFS measures employment, unemployment and inactivity, and also collects other information on the resident population, in particular citizenship, which can be used to produce estimates of the number of EU citizens living/working in another Member State. EU-LFS data is therefore the best EU wide source to estimate numbers of active EU movers (mobile workers)[255]. In addition, it can

[251] Ibid.
[252] Article 5 Regulation 492/2011 and Article 14(4)(b) Directive 2004/38, source: Verschueren, H. (2015) 'Free movement of workers: the role of Directive 2014/54/EU in tackling current and future challenges', presentation at an Equinet conference, p. 6.
[253] Eurostat 'EU-LFS database user guide. Version November 2016', p.55; description of variables WSTATOR and SEEKWORK.
[254] Regulation (EC) No 883/2004, Article 1(f).
[255] See https://ec.europa.eu/eurostat/statistics-explained/index.php?title=EU_citizens_living_in_another_Member_State_-_statistical_overview, article based on the series of datasets Labour Mobility (lfst_lmb)

provide more information about specific characteristics of EU mobile citizens, such as age and gender, sector of employment, occupation, education level, etc.

Since the EU-LFS has a legal basis (Council Regulation (EEC) No 577/98 of 9 March 1998), data collection in the Member States are harmonised to a considerable extent. Comparability of figures is ensured by using the same concepts and definitions especially the ILO definitions of employment and unemployment; using common classifications (NACE, ISCO, etc.); and recording the same set of characteristics in each country.

Microdata are accessible for researchers.

The EU-LFS has the following distinct advantages:

- For some countries, it is the only source with the suitable frequency of data on the stocks of EU foreigners broken down by citizenship.
- EU-LFS data are available on a quarterly basis and published around four months after data collection, making it possible to identify recent trends.
- The EU-LFS provides information about the length of time for which foreigners have been established in the country. It thus enables an estimate of the inflows that occurred over a certain time and helps to distinguish recent movers from those who have been in the country for a longer time.
- While the EU-LFS data might underestimate the absolute numbers of mobile workers in a country (stock), it is likely to give a reasonable indication of the changes over time (flows).
- It includes many variables related to the employment situation and socio-demographic profile of respondents.

However, estimations of 'EU movers' can suffer the following limitations:

- Mobile citizens might be underrepresented in the survey with the extent of underrepresentation being unclear (e.g. not registered, non-responding), thus making an extrapolation of the real size more difficult and less predictable than when using a census. [256]
- Small sample sizes of EU movers reduce the possibility of providing detailed analysis of data[257] (e.g. a combined analysis of the employment and skills profile of mobile workers in countries with few movers is impossible).
- Under-coverage of recently arrived foreigners due to delay in entering the reference sample frame[258];

[256] Limitations are described in Employment in Europe, 2008 (Chapter 2, p. 103).

[257] Employment in Europe, 2008 (Chapter 2, p. 103).

[258] Employment in Europe, 2008 (Chapter 2, p. 103); This seems to be particularly true for some countries (France, Italy, Austria and the Netherlands), see 'EU Employment and Social Situation. Quarterly Review', June 2014, p. 52, footnote 34; the under-estimation is likely to be due to the fact that those movers are not captured adequately by the sample (under-coverage). The Quality Report of the EU-LFS (2012), for example, shows that in many countries, household samples are drawn according to a rotation scheme, meaning that the same households are interviewed for several quarters and only a part of the sample is replaced by new households each quarter or every two quarters; therefore, there is a delay in capturing newly established households (especially if the dwelling is also new). Another reason for under-coverage is that better integrated migrants are generally covered more adequately, for example due to language issues (as mentioned, for example in the Austrian Standard Documentation on the EU-LFS 'Mikrozensus ab 2004 Arbeitskräfte- und Wohnungserhebung').

As a result, EU-LFS estimations of stocks of EU foreigners are consistently lower than figures from migration statistics, as has been noted over the past years.

In 2020 there was a break in the series for German data in the EU-LFS. This meant that data for 2020 are not directly comparable with data for previous years. The situation is particularly difficult in the case of detailed analysis. Given the importance of Germany as a destination country for movers, this affects also the comparability of the EU aggregates. This problem has been flagged in the text and where appropriate the report uses the EU-26 aggregate.

Population statistics (including international migration statistics)

International migration flows by groups of citizenship, groups of country of birth, groups of country of previous/next usual residence, age and sex and population stocks by groups of citizenship, groups of country of birth, age and sex are collected based on Regulation (EC) No 862/2007 [259] and related Implementing Regulation.

Eurostat population statistics provides data on the *stocks* of foreigners/ foreign-born persons on 1 January of the reference year[260]. For the purpose of harmonisation, Eurostat recommends the definition of 'population on 1 January' to refer to the 'usually resident population' and defines this as persons who either 'have lived in their place of usual residence[261] for a continuous period of at least 12 months before the reference time; or those who arrived in their place of usual residence during the 12 months before the reference time with the intention of staying there for at least one year'[262].

Eurostat migration and citizenship data provides data on *inflows and outflows* by citizenship or country of birth or previous/next country of residence[263]. Due to legal deadlines and including the time needed for Eurostat to validate and process the data migration statistics are published more than one year after the reference period/date[264]. Data on inflows and outflows equally refers to persons moving their place of usual residence to another country with the intention of staying at least for one year.

According to Regulation (EC) No 862/2007, there is no obligation for Member States to breakdown the numbers of EU foreigners by citizenship. Still in 2018, only Cyprus and Malta, and Spain for some countries of citizenship, did not report break-downs by EU citizenship. However, when selecting a specific age group (e.g. 20 to 64 years), the number of Member States detailing the nationality of mobile EU citizens, decreases to 21.[265]

Further reported variables are age group and sex. No information is available concerning the duration of residence, employment status, or education level.

Migration statistics are mostly based on administrative registers which includes coverage errors, mainly due to the non-propensity to register or deregister. The practical necessity to be registered for further administrative services (e.g., to open a bank account, to rent a flat) make data on arrivals more complete than data on departures.[266]. Data providers use the

[259] Regulation (EC) No 862/2007 of the European Parliament and of the Council of 11 July 2007 on Community statistics on migration and international protection and repealing Council Regulation (EEC) No 311/76 on the compilation of statistics on foreign workers, OJ L 199, 31 July 2007, p. 23 and Commission Implementing Regulation (EU) No 351/2010 of Regulation (EU) No 862/2007.

[260] Data sets: migr_pop1ctz and migr_pop2ctz, migr_pop3ctb, migr_pop4ctb, migra_pop5ctz, migr_pop6ctb.

[261] Usual residence means the place where a person normally spends the daily period of rest, regardless of temporary absences for purposes of recreation, holidays, visits to friends and relatives, business, medical treatment or religious pilgrimage. Source: Eurostat, Reference Metadata on datasets 'Population' (demo_pop), available at: https://ec.europa.eu/eurostat/cache/metadata/en/demo_pop_esms.htm.

[262] Eurostat, Reference Metadata on datasets 'Population' (demo_pop), available at: https://ec.europa.eu/eurostat/cache/metadata/en/demo_pop_esms.htm.

[263] Data sets: migr_immi, migr_emi and respective subsets.

[264] As of October 2014, the latest data on 'stock' refers to the situation on 1st January 2013 and the latest data on 'in- and outflows' refers to flows that occurred during 2012.

[265] Eurostat, dataset: Population on 1 January by age group, sex and citizenship (migr_pop1ctz), extracted on 23/09/2019.

[266] Fajth, V., Siegel, M., Bruni, V., Gelashvili, T. (2018), Monitoring migration within the EU with existing data, REMINDER project, p. 13.

following strategies to increase the reliability of these statistics: exchange of data with other National Statistical Institutes; estimation techniques; usage of additional administrative sources. Not least linked to the quality checks, population and migration statistics have a substantial time gap between collection and publication, e.g. Eurostat migration data for 2020 was not available at the time of writing for all EU Member States.

The fact that under-coverage is less likely for arriving movers, but that many movers may not deregister, explains why data on stocks from population statistics are usually higher than those estimated by the EU-LFS.

Although both citizenship and previous/next country of residence are collected for inflow/outflow data, the two cannot be combined. This implies for instance that the estimates on inflows to Member States either have to be based on previous country residence being another Member State (and thus include third-country nationals) or have to be based on citizenship of another Member States (and thus include EU citizens immigrating from third countries).

A.3 Estimates of EU aggregates

Some countries do not report data for individual countries of citizenship in the population and/or migration statistics. This means that the category of 'EU-27 countries (from 2020) except reporting country' is not available for the variable 'citizenship', nor is the category 'UK' as citizenship. These countries are: CY, DE, EL, FR, HR, MT, PL (general population statistics) and CY, DE, EL, FR, HR, IE, MT, PL, PT (international migration statistics). Since data on EU-28 non-native citizens is available, this was taken as a baseline. Subsequently, other sources for these countries were used to calculate the shares of EU-27 from EU-28 non-native citizens in the respective year for each of the countries. These shares were then applied to the EU-28 data in the population/migration statistics. The other sources used were: EU-LFS, population/migration statistics for all age groups (where data was available), national sources (where available and easily accessible). A cross-check between the shares in different sources was done and the value chosen that seemed to be more plausible. The shares in the different sources and those applied to calculate the estimate can be found in the table below.

Table A.0: Shares used for estimations of missing data for EU-27 non-native citizens in population and migration statistics

Dataset and year	EU-27 nationality missing for	Estimate based on
Population data (stocks) for 20-64 years: 2019, 2020	2019 : CY, DE, EL, FR, HR, NL, PL 2020 : CY, EL, FR, HR, MT, PL	Shares of EU-27 from EU-28 (20-64) in EU-LFS: **2019:** CY (90%), DE (98%)[267], EL (95%), FR (95%), HR (100%), NL (93%), PL (87%) **2020:** CY (91%), EL (94%), FR (95%), HR (100%), MT (64%), PL (94%)
Immigration data (inflows) for 20-64 years: 2018, 2019	2018: CY, DE, EL, FR, HR, IE, MT, PL, PT 2019 : CY, DE, EL, FR, HR, IE, MT, PL, PT, RO	DE: figure based on national flow data - *Wanderungsstatistik*): 2018: 99%, 2019: 98% FR: figure based on share of EU-27 from EU-28 movers of all ages in ESTAT inflow data: 2018: 88%, 2019: 88%

[267] For the purpose of validation, the share has also been calculated based on national stock data – the result is the same as the share in the EU-LFS data: 31/12/2018: 98%, 31/12/2019: 98%, 31/12/2020: 98%. Source: Destatis, Ausländerstatistik, Genesis database, table 12521-0003, available at: https://www-genesis.destatis.de/genesis/online?operation=abruftabelleBearbeiten&levelindex=1&levelid=1631005215687&auswahloperation=abruftabelleAuspraegungAuswaehlen&auswahlverzeichnis=ordnungsstruktur&auswahlziel=werteabruf&code=12521-0003&auswahltext=&nummer=6&variable=6&name=STAAG6&werteabruf=Werteabruf#abreadcrumb

		HR: figure based on share of EU-27 from EU-28 movers of all ages in ESTAT inflow data: 2018: 94%, 2019: 92% CY, EL, IE, MT, PL, PT: figures based on share of EU-27 from EU-28 movers in LFS (20-64 yrs) in 2018/2019 RO: no data in EU-LFS available, so no estimate could be made
Emigration data (outflows) for 20-64 years: 2018, 2019	2018: CY, DE, EL, FR, IE, MT, PL, PT 2019: CY, DE, EL, FR, IE, MT, PL, PT	For CY, EL, FR, PT, no data for EU-28 movers of working age is available either; therefore, these values were not estimated and are marked as missing. DE: figure based on national flow data - *Wanderungsstatistik*): 2018: 99%, 2019: 98% IE, MT, PL: figures based on share of EU-27 from EU-28 movers in LFS (20-64 yrs) in 2018/2019

A.4 Return mobility and reliability of data

Country-specific data collection and reliability

Locating internationally comparable data on return mobility is challenging for two main reasons: there is a lack of data collected in the first place, and where it is available, definitions vary between (and even within) countries and/or data sources. However, Eurostat figures based on registry data provides the main source of internationally comparable statistics on inflows and outflows. Data is available by age, citizenship and previous/next country of residence. Eurostat migration data also refers to stays of one year or more and does therefore not include returnees who have been abroad for a shorter period.

Thus, return mobility can be approximated by either:

- inflows to a country of origin of persons holding the citizenship of that country, or
- by outflows from a destination country to a country of origin of persons holding the citizenship of the country of origin.

Due to data confidentiality rules, it can only give insights on *either* citizenship *or* previous/next country of residence.

National data sources can fill some of these gaps if they have information on both returnees and their previous countries of residence. Relevant datasets, and the areas they cover, are outlined in Table A 1 for the countries with the largest number of returnees.

Table A 1: Indicative list of available data on return mobility among EU-27 countries and the UK

MS	Data	Comment
EU-27	Eurostat data on inflows by citizenship[268] *or* by previous country of residence.	Comparable data for all Member States, used to estimate general return mobility over time.

[268] Eurostat (2021a) 'Immigration by age group, sex and citizenship' [MIGR_IMM1CTZ]; Eurostat (2021b) 'Immigration by age group, sex and country of previous residence' [MIGR_IMM5PRV]..

MS	Data	Comment
DE	Flows between DE and other MS, 2000-2019[269].	Citizenship breakdown only possible for German and non-German.
ES	Flows between ES and other MS, 2008-2019[270].	Breakdown of flows include a category for 'Nationals of the country of origin/destination'.
FR	No data available.	
IT	Flows between IT and other MS, 2002-2019[271].	Citizenship breakdown only possible for Italian and non-Italian.
PL	Flows between PL and other MS, 1966-2018 except 2015[272].	Last updated in July 2019. No update of this data is currently scheduled on the website.
RO	Flows between RO and *some* other Member States, 2000-2019[273].	Limited data availability: flows data by previous/next residence only for some countries, with no specific EU category.
UK	Flows between UK and (among others) EU MS, 2000-2019[274].	Citizenship breakdowns available for all nationalities where figures are above reliability thresholds.

Source: Authors' own elaboration.

Notes on reliability of UK data

Official population estimates from the Office for National Statistics (ONS) have previously relied heavily on the census that is carried out every ten years, while estimates of migration between the census points has been underpinned by the International Passenger Survey (IPS), which registers foreign citizens entering and leaving the UK.

The ONS is currently in the process of modernising their migration and population estimates using administrative data as the IPS has been determined to be of too low reliability: it is stretched beyond its original purpose, and was furthermore paused in 2020 due to the disruption relating to the COVID-19 pandemic[275]. Since the beginning of the transformation in 2019, the previous Migration Statistics Quarterly Reports have therefore been classified as 'Experimental Statistics'[276]. However, the IPS data still constitutes the best available source of these estimates.

[269] Destatis (2020) 'Wanderungen zwischen Deutschland und dem Ausland: Deutschland, Jahre, Nationalität, Herkunfts-/Zielländer', accessed 18 June 2021.

[270] Instituto Nacional de Estadística (INE) (2021a) 'Immigration flow from abroad by semester, sex, age group, country of origin, nationality (Spanish/foreign) and country of birth with respect to the country of origin'; INE (2021b) '1.13: Emigration flow abroad by semester, sex, age group, country of destination, nationality (Spanish/foreign) and country of birth with respect to the country of destination'.

[271] IStat (2021a) 'Migration (Transfer of residence): Emigrants – country of next residence'; IStat (2021b) 'Migration (Transfer of residence): Immigrants – country of origin'.

[272] Statistics Poland (2019) 'Main directions of emigration and immigration in the years 1966-2018 (migration for permanent residence)'.

[273] National Institute of Statistics (INSSE) (2021) 'Social Statistics: Internal and International Migration'.

[274] Office for National Statistics (ONS) (2020) 'International Passenger Survey 4.03, country of birth by country of last or next residence'.

[275] The current system, the planned changes and the reasons underpinning it, are extensively outlined in ONS (2021) 'Population and migration statistics system transformation – overview', Newport: ONS.

[276] ONS (2019) 'Statement from the ONS on the reclassification of international migration statistics', Newport: ONS.

ANNEX B - Data Annex

B.1 Section 1 – Mobility of EU citizens

Table A 2: Population on 1 January of EU-28 movers in EU and EFTA countries, in thousands, 2011-2019; EU-27 movers for 2019-2020

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2019 EU-27	2020 EU-27
EU Member States											
EU-28	8 922	9 586	9 993	10 719	11 323	11 847	12 424	12 878	12 949	12 429	
EU-27	:	:	:	:	:	:	:	:	:	9 786	9 942
Austria	271	290	315	391	431	465	493	520	546	538	563
Belgium	529	546	563	573	588	601	609	617	630	616	630
Bulgaria	6	6	9	9	9	9	9	9	9	7	7
Cyprus	77	80	83	83	79	81	83	87	93	84	85
Czechia	118	132	140	149	158	166	176	184	193	187	195
Germany	1 754	1 924	2 125	2 492	2 704	2 935	3 047	3 200	3 321	3 254	3 290
Denmark	101	109	119	129	139	152	163	171	180	165	168
Estonia	10	12	6	6	12	12	13	16	17	17	16
Greece	161	159	153	149	151	156	154	158	157	149	128
Spain	1 558	1 576	1 538	1 470	1 424	1 402	1 393	1 385	1 406	1 258	1 280
Finland	48	53	59	65	69	72	75	75	76	72	73
France	889	901	910	936 *(b)*	948	954	964	960	969 *(p)*	922	911
Croatia			5	6	7	8	9	10	10	10	11
Hungary	101	65	63	63	63	66	61	61	58	56	61
Ireland	311	306	305	312	317	321	331	336	346 *(e)*	268	275
Italy	828	882	972	1 125	1 161	1 176	1 187	1 201	1 147 *(b)*	1 128 *(b)*	1 125
Lithuania	2	2	2	3	3	4	4	5	6	5	6
Luxembourg		138	143	149	155	160	166	170 *(b)*	172	168	169

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2019 EU-27	2020 EU-27
Latvia	4	4	4	5	5	4	4	5	5	5	5
Malta	8	8	9	10	13	17	23	30	36	24	27
Netherlands	271	291	304	320	341	362	385	414	447	410	449
Poland	18	19	19	21 *(p)*	22 *(p)*	19 *(ep)*	22 *(ep)*	25 *(ep)*	26	23	27 *(ep)*
Portugal	80	83	76	74	73	75	84	97	113	98	111
Romania		14	17	17	29	41	45	47	49	47	49 *(e)*
Sweden	196	198	201	205	210	216	221	227	231	214	218
Slovenia	4	5	5	13	14	14	15	16	17	16	17
Slovakia	46	44	46	37	38	41	43	45	46	45	46
United Kingdom	1 530	1 739	1 802	1 907	2 160	2 316	2 645	2 809	2 643	2 643	:
EFTA countries											
EFTA	973	1032	1090	1173	1228	1264	1289	1307	1327	1285	1312
Switzerland	789	821	856	917	955	980	997	1 007	1 018	990	1 004
Iceland	14	13	13	14	16	17	21	27	32	31	34
Norway	170	197	221	241	258	267	271	273	277	265	274

: Not available; e Estimated value; p Provisional data; b Break in series

Numbers on stocks of EU-27 movers are estimated for: Cyprus, France, Croatia, Greece, Malta, Poland (2019 and 2020); Germany (2019). Estimation based on equivalent shares of EU-27 movers from EU-28 movers in EU-LFS data.

Source: Eurostat [migr_pop1ctz], Milieu calculations

Table A 3: Inflows, outflows and net mobility of Member States' own citizens (20-64 years), in thousands, 2011-2019

	2011			2016			2018			2019		
	Inflows	Outflows	Net	Inflows	Outflows	Net	Inflows	Outflows	Net	Inflows	Outflows	Net
EU Member States												
EU-28	596	848	-252	664	1030	-367	738	936	-198	793	946	-152
EU-27	:	:	:	605	918	-312	678	827	-149	721	818	-97
Austria	6	11	-5	7	11	-4	7	10	-4	7	11	-4
Belgium	9	24	-15	12	23	-11	12	24	-12	12	23	-11
Bulgaria	:	:	:	6 *(p)*	21 *(p)*	-14	11 *(p)*	24 *(p)*	-14	16 *(p)*	30 *(p)*	-14
Cyprus	2	:	:	3	:	:	4	:	:	4	:	:
Czechia	7	:	:	4	6	-2	4	5	-1	4	5	-1
Germany	59	81	-21	75 *(b)*	175 *(be)*	-101	108 *(be)*	161 *(e)*	-52	115 *(be)*	165 *(be)*	-50
Denmark	13	11	2	14	11	3	13	10	3	13	10	3
Estonia	2	4	-3	6	8	-2	7	5	1	6	5	1
Greece	20	:	:	22 *(b)*	:	:	23	:	:	24	:	:
Spain	22	39	-17	38	65	-27	52	57	-5	53	56	-3
Finland	6	7	-1	5	8	-3	6	9	-3	6	8	-2
France	82	:	:	95	:	:	89	:	:	89	:	:
Croatia	3	7	-4	6	26	-20	6	27	-21	7	24	-17
Hungary	5	12	-7	26	28	-2	30	22	8	30	21	9
Ireland	16 *(b)*	40 *(b)*	-24	21	23	-2	23	20	4	16	21	-5
Italy	20	38	-18	25	86	-61	31	89	-57	46	94	-48
Lithuania	12	42	-30	12	37	-24	14	23	-8	18	19	-1
Luxembourg	1	1	-1	1	2	-1	1	2	-1	1	2	-1
Latvia	6	18	-12	3	13	-10	3	9	-6	3	8	-4
Malta	1	1	0	1	1	0	1	1	0	1	1	0

	2011			2016			2018			2019		
	Inflows	Outflows	Net	Inflows	Outflows	Net	Inflows	Outflows	Net	Inflows	Outflows	Net
Netherlands	24	43	-19	27	40	-13	29	35	-6	30	33	-3
Poland	83	162	-79	69 *(ep)*	141 *(ep)*	-73	54 *(ep)*	106 *(ep)*	-52	50 *(ep)*	102 *(ep)*	-52
Portugal	9	:	:	11 *(e)*	:	:	16	:	:	20	:	:
Romania	115	152	-37	100	169	-69	118 *(e)*	163 *(e)*	-45	136 *(e)*	159 *(e)*	-23
Sweden	14	20	-6	13	16	-3	11	16	-5	10	15	-5
Slovenia	2	3	-1	2	7	-5	3	5	-2	2	5	-2
Slovakia	1	1	-1	1 *(p)*	3	-2	1 *(p)*	2	-1	1 *(p)*	3	-2
United Kingdom	58	130	-72	58	112	-54	61	110	-49	72	128	-56
EFTA countries												
EFTA	22	30	-8	21	30	-9	21	30	-9	21	29	-8
Switzerland	16	22	-5	16	22	-6	16	23	-7	16	23	-6
Iceland	1	2	-1	1	2	0	1	2	0	1	1	0
Norway	4	6	-1	3	6	-2	4	6	-2	3	5	-2

: Not available; e Estimated value; p Provisional data; b Break in series

Data on outflows by nationality are not available for Cyprus, Greece, France or Portugal for any years. Due to rounding, cells indicating 0 are to be understood as less than 1 000.

Source: Eurostat [migr_imm1ctz, migr_emi1ctz], Milieu calculations

Table A 4: Inflows, outflows and net mobility of citizens of other EU-28 Member States (20-64 years), in thousands, 2011-2019

	2011 (EU-28)			2016 (EU-28)			2018 (EU-28)			2018 (EU-27)			2019 (EU-27)		
	Inflows	Outflows	Net	Inflows	Outflows	Net	Inflows	Outflows	Net	Inflows	Outflows	Net	Inflows	Outflows	Net
EU Member States															
EU-28	744	372	372	1063	517	546	1020	563	457	967	:		1 004	663	341
EU-27	:	:	:	:	:	:	853			800	:	:	790	481	309
Austria	38	18	19	52	26	26	52	26	26	51	26	25	53	28	25
Belgium	50	25	25	46	30	16	50	29	21	49	28	20	52	30	22
Bulgaria	:	:	:	1 *(p)*	1 *(p)*	0	1 *(p)*	0 *(p)*	1	1	0	0	1	0	1
Cyprus	10	:	:	6	:	:	7	:	:	6 *(e)*	:	:	5	:	:
Czechia	9	:	:	24	5	19	15	2	12	14	2	12	26	27	-1
Germany	191	59	132	321 *(b)*	135 *(be)*	186	300 *(be)*	168 *(e)*	132	297 *(e)*	167 *(e)*		273	195	78
Denmark	15	12	3	21	18	3	21	21	0	19	20	-1	18	23	-5
Estonia	0	0	0	3	2	1	4	2	2	4	2	2	3	4	0
Greece	9	:	:	12 *(b)*	:	:	12	:	:	12 *(e)*	:	:	10	:	:
Spain	:	85	:	86	87	-1	108	81	28	92	70	22	93	67	26
Finland	7	2	5	6	3	3	6	4	2	5	4	2	5	3	2
France	61	:	:	58	:	:	53	:	:	47 *(e)*	:	:	44	:	:
Croatia	1	1	0	2	0	1	2	1	1	2 *(e)*	:	:	2	:	:
Hungary	10	0	9	8	6	3	9	13	-4	8	12	-4	8	12	-4
Ireland	16	18	-3	22	15	7	23	12	11	18 *(e)*	10 *(e)*		17	10	7
Italy	93	12	81	51	16	35	45	16	29	44	16	28	44	22	22
Lithuania	0	0	0	1	0	1	1	0	1	1	0	1	1	0	1
Luxembourg	12	5	7	13	7	6	13	7	6	13	7	6	13	8	5
Latvia	0	1	0	0	0	0	1	0	0	1	0	0	1	0	0
Malta	1	1	0	7	3	5	10	3	7	6 *(e)*	:	:	6	:	:

	2011 (EU-28)			2016 (EU-28)			2018 (EU-28)			2018 (EU-27)			2019 (EU-27)		
	Inflows	Outflows	Net	Inflows	Outflows	Net	Inflows	Outflows	Net	Inflows	Outflows	Net	Inflows	Outflows	Net
Netherlands	43	23	19	53	29	24	66	33	33	61	30	31	69	32	37
Poland	11	15	-4	17 *(ep)*	13 *(ep)*	4	14 *(ep)*	13 *(ep)*	1	13 *(e)*	12 *(e)*		16	:	:
Portugal	2	:	:	5 *(e)*	:	:	6	:	:	5 *(e)*	:	:	9	:	:
Romania	3	1	2	5	0	4	7 *(e)*	5 *(e)*	3	7	5	3		8	-8
Sweden	20	10	10	25	10	15	23	11	13	21	10	11	19	11	8
Slovenia	2	1	1	3	2	1	3	2	1	3	2	1	3	2	1
Slovakia	3	0	3	3 *(p)*	0	3	2 *(p)*	0	2	2	0	2	2	0	1
United Kingdom	139	84	55	212	109	104	167	113	55	167	113	55	145	141	4
EFTA countries															
EFTA	108	43	65	94	67	27	93	69	24	89	66	23	93	64	29
Switzerland	73	36	37	72	50	21	68	56	12	65	53	12	69	54	15
Iceland	1	1	0	5	1	4	8	2	6	7	2	6	6	2	4
Norway	34	6	29	18	16	2	18	12	6	17	11	6	18	7	10

: Not available; e Estimated value; p Provisional data; b Break in series

Figures relate to persons moving to and from the country indicated, regardless of their previous residence. Figures may therefore include EU-28 citizens moving to or from third countries.

Data on outflows by nationality are not available for Cyprus, Greece, France or Portugal for any years. Due to rounding, cells indicating 0 are to be understood as less than 1 000.

Data on inflows of EU-27 movers are estimated for: CY, EL, IE, MT, PL, PT, based on EU-LFS data; for DE, based on national data (Wanderungsstatistik); for FR and HR, based on immigration data for all ages.

Data on outflows of EU-27 movers are estimated for: IE and PL, based on EU-LFS; for DE, based on national data (Wanderungsstatistik).

Figures for AT, EL, IE, MT, RO, SI and UK are based on age definition ‘age completed in years’.

Source: Eurostat [migr_imm1ctz, migr_emi1ctz], Milieu calculations

Table A 5: Acquisition of the citizenship of another EU Member State by UK nationals, 2011-2019

Acquired citizenship	2011	2016	2017	2018	2019	Trend
EU-27	1 944	6 689	15 054	16 193	29 842	
Austria	3	9	21	40	91	
Belgium	114	506	1 381	1 045	1 630	
Bulgaria	0	0	1	0	2	
Croatia	7	2	0	2	5	
Cyprus	392	471	645	658	605	
Czechia	:	21	36	27	38	
Denmark	32	85	164	143	118	
Estonia	0	0	0	1	0	
Finland	16	31	147	134	211	
France	261	517	1 733	3 268	4 088	
Germany	284	2 702	6 851	6 250	13 675	
Greece	15	31	58	52	30	
Hungary	6	11	14	22	52	
Ireland	68	98	529	687	665	
Italy	82	119	128	231	394	
Latvia	:	130	119	97	117	
Lithuania	0	0	0	0	0	
Luxembourg	45	128	377	399	365	
Malta	52	126	195	295	213	
Netherlands	207	640	1 248	1 258	2 597	
Poland	12	5	16	27	37	
Portugal	13	20	74	100	110	
Romania	:	0	:	:	:	
Slovakia	0	15	33	60	70	
Slovenia	0	0	2	1	5	
Spain	49	44	54	56	235	
Sweden	286	978	1 228	1 340	4 489	

Source: Eurostat, international migration statistics [migr_acq]

B.2 Section 2 – Mobility of workers

Table A 6: Activity rate (%) of working age EU-28 movers (2011-2019) and EU-27 movers (2019-2020), by country of residence

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2019 EU-27	2020 EU-27
EU Member States											
EU-28	91	90	90	91	92	93	94	94	94	94	
EU-27	90	89	89	89	90	92	92	93	93	94	93
Austria	95	95	94	93	93	93	95	95	95	95	93
Belgium	93	92	91	92	92	93	93	94	95	95	95
Bulgaria											
Cyprus	89	87	84	85	86	89	92	93	95	95	93
Czechia	95	95	94 (u)	95 (u)	97	96	99 (u)	98	99 (u)	99 (u)	99 (u)
Germany	94	95	95	95	95	96	96	96	96	96	95
Denmark	92 (u)	91	91	91	92	93	92	92	95	95	95
Estonia											
Greece	91	82	75	79	82	80	82	82	83	83	82
Spain	77	75	75	76	80	82	84	86	88	87	84
Finland			94 (u)	93 (u)	92 (u)	94 (u)	95 (u)	94 (u)			94 (u)
France	94	93	93	92	91	92	93	93	93	94	95
Croatia											
Hungary											
Ireland	85	85	86	89	91	93	94	95	96	96	95
Italy	91	90	88	88	88	89	90	90	89	89	91
Lithuania											
Luxembourg	96	95	94	95	94	95	96	96	95	95	94
Latvia											

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2019 EU-27	2020 EU-27
Malta											95 (u)
Netherlands	95	95	93	94	92	94	96	97	97	97	97
Poland											
Portugal											
Romania											
Sweden	93	92	91	92	93	94	93	96	96	97	93
Slovenia											
Slovakia											
United Kingdom	94	94	94	95	96	96	97	98	97	97	
											EFTA countries
EFTA	96	96	95	95	94	94	94	95	95	95	95
Switzerland	96	96	95	95	95	94	94	95	95	95	95
Iceland											91
Norway	96	96	95	94	93	94					95

u low reliability; blank cells figures below reliability threshold for publishing.

Figures exclude movers born in their country of residence.

German data for 2020 is of low comparability with 2019 due to break in series in German LFS data.

Source: Eurostat, EU-LFS, specific extractions provided by Eurostat, Milieu calculations

Table A 7: Employment rate (%) of working age EU-28 movers (2011-2019) and EU-27 movers (2019-2020), by country of residence

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2019 EU-27	2020 EU-27
EU Member States											
EU-28	70	70	71	72	73	75	76	77	78	78	
EU-27	68	68	68	69	70	72	73	74	75	75	73

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2019 EU-27	2020 EU-27
Austria	72	74	75	76	75	76	77	77	77	77	76
Belgium	66	65	65	67	67	70	69	71	72	72	72
Bulgaria											
Cyprus	74	71	65	67	69	71	74	73	78	81	78
Czechia	77 *(u)*	76 *(u)*	79	76	80 *(u)*	85 *(u)*	87 *(u)*	85 *(u)*	86 *(u)*	86 *(u)*	86 *(u)*
Germany	72	74	74	75	76	78	78	79	80	80	78
Denmark	74 *(u)*	74	74	79	77	77	75	76	80	80	81
Estonia											
Greece	65	56	52	55	58	55	56	54	51	51	52
Spain	58	57	58	59	62	65	67	68	71	72	65
Finland			75 *(u)*	77 *(u)*	78 *(u)*	77 *(u)*	79 *(u)*	78 *(u)*			81 *(u)*
France	70	68	70	69	68	70	71	73	72	73	73
Croatia											
Hungary											
Ireland	66	67	69	70	71	75	77	78	79	81	77
Italy	69	69	66	66	67	67	67	67	66	66	62
Lithuania											
Luxembourg	76	77	76	78	75	75	77	78	78	78	76
Latvia											
Malta							83 *(u)*	82			92 *(u)*
Netherlands	75	77	74	75	74	76	78	77	79	79	79
Poland											
Portugal											
Romania											
Sweden	75	74	75	77	79	78	81	84	82	81	80

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2019 EU-27	2020 EU-27
Slovenia	70	89	60	66	69	77	76	88	91	91	82
Slovakia											
United Kingdom	78	78	79	81	82	82	84	86	86	86	
EFTA countries											
EFTA	82	83	83	83	83	83	83	84	86	86	84
Switzerland	82	82	82	82	83	83	83	84	86	86	85
Iceland											
Norway											

u low reliability; blank cells figures below reliability threshold for publishing.
Figures exclude movers born in their country of residence.
German data for 2020 is of low comparability with 2019 due to break in series in German LFS data.
Source: Eurostat, EU-LFS, specific extractions provided by Eurostat, Milieu calculations

Table A 8: Unemployment rate (%) of working age EU-28 movers (2011-2019) and EU-27 movers (2019-2020), by country of residence

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2019 EU-27	2020 EU-27
EU Member States											
EU-28	12	12	12	12	10	9	8	7	7	7	
EU-27	13	14	14	14	12	10	9	9	8	8	9
Austria	7	7	7	8	8	8	7	6	6	6	8
Belgium	10	11	12	11	11	9	10	8	7	7	7
Bulgaria											
Cyprus	13	16	20	18	17	14	10	9	6	6	9
Czechia	6 *(u)*	6 *(u)*	7	7	4 *(u)*	4 *(u)*	1 *(u)*	2 *(u)*	2 *(u)*	2 *(u)*	1 *(u)*
Germany	7	7	7	7	7	5	5	5	4	4	6
Denmark	9 *(u)*	11	11	11	10	9	10	10	6	6	6
Estonia											
Greece	12	24	32	28	24	26	25	25	25	26	28
Spain	28	30	30	29	25	22	19	17	15	15	20
Finland			8 *(u)*	8 *(u)*	9 *(u)*	7 *(u)*	6 *(u)*	7 *(u)*			6 *(u)*
France	8	10	9	10	12	11	9	8	8	8	7
Croatia											
Hungary											
Ireland	19	18	16	14	11	8	7	6	5	5	6
Italy	11	13	15	15	15	14	13	13	14	14	13
Lithuania											
Luxembourg	5	6	7	6	8	7	5	5	6	6	7
Latvia											

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2019 EU-27	2020 EU-27
Malta											
Netherlands	6	6	9	8	9	7	4	4	4	4	4
Poland											
Portugal											
Romania											
Sweden	9	9	11	10	8	7	8	4	4	4	9
Slovenia											
Slovakia											
United Kingdom	7	7	7	5	5	4	4	3	3	3	
EFTA countries											
EFTA	5	5	6	6	6	6	6	6	5	5	6
Switzerland	5	5	6	6	6	6	6	6	5	5	6
Iceland											
Norway	5	4	5	6	8	6	5 *(u)*				

u low reliability; blank cells figures below reliability threshold for publishing.
Figures exclude movers born in their country of residence.
German data for 2020 is of low comparability with 2019 due to break in series in German LFS data.
Source: Eurostat, EU-LFS, specific extractions provided by Eurostat, Milieu calculations

Table A 9: Employment rate (%) of working age EU-28 movers (2011, 2016, 2019) and EU-27 movers (2019-2020), by gender and by country of residence

	2011 (EU28)		2016 (EU28)		2019 (EU28)		2019 (EU27)		2020 (EU27)	
	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females
EU MemberStates										
EU-28	78	63	82	67	85	71	85	71		
EU-27	76	61	80	65	83	67	83	68	80	65
Austria	78	64	80	70	82	72	82	72	80	71
Belgium	72	59	74	64	78	66	78	66	79	66
Bulgaria										
Cyprus	79	66	76	64	84	72	87	75	86	69
Czechia	89 *(u)*		96 *(u)*	72 *(u)*	95 *(u)*	75			95 *(u)*	74 *(u)*
Germany	81	63	86	68	88	71	88	72	83	69
Denmark		62 *(u)*	81 *(u)*	64 *(u)*	82 *(u)*	71 *(u)*	84	68		72 *(u)*
Estonia										
Greece	78 *(u)*	56	66 *(u)*	39	57 *(u)*	31	57	31		31
Spain	64	53	71	59	78	64	79	65	72	58
Finland										
France	76	62	73	67	76	66	76	67	76	68
Croatia										
Hungary										
Ireland	70	60	83	66		71			88 *(u)*	68 *(u)*
Italy	81	61	76	61	79	57	79	57	76	53
Lithuania										
Luxembourg	83	67	80	69	82	73	81	73	79	72
Latvia										

	2011 (EU28)		2016 (EU28)		2019 (EU28)		2019 (EU27)		2020 (EU27)	
	Males	Females	Males	Females	Males	Females	Males	Females	Males	Females
Malta										
Netherlands	80	69	82	70	85	74	85	74		73
Poland										
Portugal										
Romania										
Sweden	80	67	82	74		70			88 *(u)*	73
Slovenia										
Slovakia										
United Kingdom	86	72	90	74	92	80	92	80		
EFTA countries										
EFTA	88	75	87	78	89	80	89	81	87	79
Switzerland	88	74	87	78	90	81	90	81	88	80
Iceland										
Norway	89	83	87	81						

u low reliability; blank cells figures below reliability threshold for publishing.
Figures exclude movers born in their country of residence.
German data for 2020 is of low comparability with 2019 due to break in series in German LFS data.
Source: Eurostat, EU-LFS, specific extractions provided by Eurostat, Milieu calculations

B.3 Section 3 – COVID-19 and intra-EU labour mobility

Table A 10: Year-on-year change in EU movers and nationals employed by detailed sector, 2019-2020

Sector	EU movers			Nationals		
	2019	2020	Year-on-year change (%)	2019	2020	Year-on-year change (%)
Food and beverage service activities	457 275	390 667	-15	5 198 147	4 661 417	-10
Specialised construction activities	457 096	414 968	-9	6 571 387	6 494 830	-1
Retail trade, except of motor vehicles and motorcycles	424 670	422 340	-1	14 532 488	14 209 984	-2
Services to buildings and landscape activities	325 120	289 356	-11	2 932 438	2 658 732	-9
Activities of households as employers of domestic personnel	292 019	245 588	-16	1 109 512	975 800	-12
Human health activities	278 931	268 373	4	13 402 761	13 428 852	0
Education	290 708	301 309	-4	11 223 927	11 243 163	0
Construction of buildings	243 845	188 577	-23	3 590 522	3 341 732	-7
Wholesale trade, except of motor vehicles	229 283	213 292	-7	6 354 317	6 102 915	-4
Accommodation	192 010	137 631	-28	1 842 276	1 572 679	-15
Manufacture of food products	182 881	132 597	-27	2 459 556	2 264 897	-8
Warehousing and support activities for transportation	181 686	163 336	-10	3 683 295	3 503 909	-5

EU aggregate: EU-27

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

Table A 11: Year-on-year percentage change in number of movers and nationals employed in major occupation groups, EU-27 aggregate, 2019-2020

Broad occupation group	EU movers			Nationals		
	2019	2020	Year-on-year change (%)	2019	2020	Year-on-year change (%)
Legislators, senior officials and managers	272 456	240 990	-12	9 367 705	8 985 503	-4
Professionals	947 777	1 020 549	8	35 291 590	36 843 939	4
Technicians and associate professionals	665 049	625 154	-6	30 863 647	29 518 023	-4
Clerks	387 515	375 606	-3	17 424 021	17 628 176	1
Service workers and shop and market sales workers	1 026 303	906 896	-12	27 985 856	26 505 939	-5
Skilled agricultural and fishery workers	98 756	45 522	-54	6 043 792	5 949 206	-2
Craft and related trades workers	974 498	861 196	-12	20 383 946	19 602 559	-4
Plant and machine operators and assemblers	552 444	523 126	-5	13 662 449	13 081 493	-4
Elementary occupations	1 252 313	1 074 176	-14	13 018 582	12 258 267	-6

EU aggregate: EU-27

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

B.4 Section 4 – Return mobility

Table A 11: Inflows of Member States' own citizens by age group, in thousands, 2011-2019

	20 to 34 years			35 to 49 years			50 to 64 years			65 years and older		
	2011	2016	2019	2011	2016	2019	2011	2016	2019	2011	2016	2019
EU Member States												
EU-28	327	345	400	177	212	259	92	107	135	44	49	61
EU-27		310	354		195	236		100	130		45	59
Austria	2	2	3	2	3	2	1	2	2	1	1	1
Belgium	4	5	5	3	4	4	2	3	3	1	1	1
Bulgaria		2	5 *(p)*		2	5 *(p)*		2	6 *(p)*		1	4 *(p)*
Cyprus	1	3	3	0	0	1	0	0	0	0	0	0
Czechia	5	3	2	2	1	1	1	0	0	0	0	0
Germany	25	32 *(b)*	51 *(be)*	23	27 *(b)*	41 *(be)*	11	16 *(b)*	23 *(be)*	4	5 *(b)*	7 *(be)*
Denmark	8	9	8	3	3	3	1	2	2	1	1	1
Estonia	1	2	2	1	2	2	0	1	2	0	0	0
Greece	11	12 *(b)*	13	5	5 *(b)*	6	4	5 *(b)*	5	3	5 *(b)*	5
Spain	8	15	21	8	14	19	6	8	12	4	5	7
Finland	3	3	3	2	2	2	1	1	1	1	1	1
France	55	62	59	20	22	21	7	10	10	3	5	4
Croatia	2	3	3	1	2	2	1	1	2	0	1	1
Hungary	3	14	14	1	9	11	1	4	4	0	1	1
Ireland	10	11	9	4	8	6	1	2	2	2	1	1
Italy	7	10	18	8	9	17	5	6	12	4	4	7
Lithuania	9	7	11	3	3	5	1	1	2	0	0	0
Luxembourg	0	0	0	0	0	0	0	0	0	0	0	0
Latvia	3	2	1	2	1	1	1	1	1	0	0	0

	20 to 34 years			35 to 49 years			50 to 64 years			65 years and older		
	2011	2016	2019	2011	2016	2019	2011	2016	2019	2011	2016	2019
Malta	1	1	1	0	0	0	0	0	0	0	0	0
Netherlands	12	13	15	8	9	9	4	5	6	2	3	3
Poland	55	31 *(ep)*	18 *(ep)*	17	27 *(ep)*	21 *(ep)*	12	11 *(ep)*	11 *(ep)*	4	4 *(ep)*	8 *(ep)*
Portugal	6	5 *(e)*	10	2	4 *(e)*	7	1	2 *(e)*	3	1	1 (e)	1
Romania	64	55	71 *(e)*	36	31	46 *(e)*	15	14	18 *(e)*	2	3	3 *(e)*
Sweden	8	6	5	4	4	3	2	2	2	1	1	1
Slovenia	1	1	1	1	1	1	1	0	1	0	0	1
Slovakia	0	0 *(p)*	0 *(p)*	0	0 *(p)*	0 *(p)*	0	0 *(p)*	0 *(p)*	0	0 *(p)*	0 *(p)*
United Kingdom	26	35	46	21	16	22	12	7	5	11	4	1
EFTA countries												
EFTA	10	10	10	7	7	6	4	5	4	2	3	2
Switzerland	8	8	8	6	5	5	3	4	4	2	2	2
Iceland	1	1	1	0	1	0	0	0	0	0	0	0
Norway	2	2	2	1	1	1	1	1	1	0	1	0

: Not available; e Estimated value; p Provisional data; b Break in series

Source: Eurostat [migr_imm1ctz], Milieu calculations.

Table A 12: Inflows of Member States' own citizens (20-64 years) by sex, in thousands, 2011-2019

	Females				Males			
	2011	2016	2018	2019	2011	2016	2018	2019
EU Member States								
EU-28	263	294	330	354	334	369	409	439
EU-27	:	269	299	316	:	336	379	405
Austria	2	3	3	3	4	4	4	4
Belgium	3	4	4	4	5	8	8	8
Bulgaria	:	3	6 (p)	8 (p)	:	3	4 (p)	7 (p)
Cyprus	1	1	2	2	1	2	2	2
Czechia	4	2	2	2	4	2	2	2
Germany	26	31 *(b)*	39 *(be)*	41 *(be)*	33	44 *(b)*	69 *(be)*	74 *(be)*
Denmark	6	7	6	6	7	7	7	7
Estonia	1	2	3	2	1	4	4	4
Greece	9	10 *(b)*	10	11	11	12 *(b)*	13	14
Spain	11	19	25	26	11	19	26	28
Finland	3	3	3	3	3	2	3	3
France	42	48	45	46	40	47	43	43
Croatia	1	2	3	3	1	3	4	4
Hungary	2	12	14	13	3	15	17	17
Ireland	8	10	11	8	7	11	12	8
Italy	9	10	13	19	11	15	18	27
Lithuania	6	5	6	7	7	7	8	10
Luxembourg	0	0	0	0	0	1	0	1
Latvia	2	2	1	1	3	2	2	2
Malta	1	0	1	1	1	1	1	1
Netherlands	11	12	14	14	13	15	16	16
Poland	28	30 *(ep)*	23 *(ep)*	21 *(ep)*	55	39 *(ep)*	31 *(ep)*	29 *(ep)*
Portugal	3	4 *(e)*	7	9	5	7 *(e)*	9	11
Romania	48	41	50 *(e)*	59 *(e)*	67	59	68 *(e)*	76 *(e)*
Sweden	7	6	5	5	7	7	6	5
Slovenia	1	1	1	1	1	1	2	1
Slovakia	0	0 (p)	1 (p)	0 (p)	0	0 (p)	0 (p)	0 (p)
United Kingdom	26	25	31 (p)	38	33	33	30 (p)	35
EFTA countries								
EFTA	10	10	10	10	12	11	11	11
Switzerland	8	8	8	8	9	9	9	9
Iceland	1	1	1	1	1	1	1	1
Norway	2	2	2	2	2	2	2	2

: Not available; e Estimated value; p Provisional data; b Break in series

Source: Eurostat [migr_imm1ctz], Milieu calculations

ANNEX C - Bibliography

C.1 Bibliography for the Introduction

EU legislation

Decision (EC) No 94/1 on the conclusion of the Agreement on the European Economic Area between the European Communities, their Member States and the Republic of Austria, the Republic of Finland, the Republic of Iceland, the Principality of Liechtenstein, the Kingdom of Norway, the Kingdom of Sweden and the Swiss Confederation

Decision (EC) No 2002/309 as regards the Agreement on Scientific and Technological Cooperation, of 4 April 2002 on the conclusion of seven Agreements with the Swiss Confederation

Decision (EC) No 2006/245 on the conclusion, on behalf of the European Community and its Member States, of a Protocol to the Agreement between the European Community and its Member States, of the one part, and the Swiss Confederation, of the other, on the free movement of persons, regarding the participation, as contracting parties, of Czechia , the Republic of Estonia, the Republic of Cyprus, the Republic of Latvia, the Republic of Lithuania, the Republic of Hungary, the Republic of Malta, the Republic of Poland, the Republic of Slovenia and the Slovak Republic, pursuant to their accession to the European Union

Decision (EC) No 2009/392 on the conclusion, on behalf of the European Community and its Member States, of a Protocol to the Agreement between the European Community and its Member States, of the one part, and the Swiss Confederation, of the other, on the free movement of persons regarding the participation, as contracting parties of the Republic of Bulgaria and Romania pursuant to their accession to the European Union

Directive (EC) No 2004/38 on the right of citizens of the Union and their family members to move and reside freely within the territory of the Member States

Directive (EU) No 2014/54 on measures facilitating the exercise of rights conferred on workers in the context of freedom of movement for workers Text with EEA relevance

Regulation (EC) No 96/71 concerning the posting of workers in the framework of the provision of services

Regulation (EC) No 883/2004 on the coordination of social security systems

Regulation (EU) No 492/2011 on freedom of movement for workers within the Union

Regulation (EU) No 2019/1149 of the European Parliament and of the Council of 20 June 2019 establishing a European Labour Authority.

Regulation (EU) No 2016/589 on a European network of employment services (EURES), workers' access to mobility services and the further integration of labour markets, and amending Regulations (EU) No 492/2011 and (EU) No 1296/2013

Regulation (EEC) No 1408/71 on the application of social security schemes to employed persons and their families moving within the Community

Regulation (EC) No 862/2007 on Community statistics on migration and international protection and repealing Council Regulation (EEC) No 311/76 on the compilation of statistics on foreign workers

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